



AmeriCorps Program Directors Guide

AmeriCorps Program Directors Guide

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Chapter One

Introduction, History & Structure

Introduction

The Governor’s Office of Community Service (OCS), also referred to as ServeMontana, provides this AmeriCorps Program Director’s Guide to set policies and procedures, and to assist AmeriCorps program staff. It serves as a resource for program staff to maintain sound operations in compliance with federal and state statutes, regulations, and policies. This guide does not supersede requirements established by CNCS, AmeriCorps Terms and Conditions, the subaward agreement with the State of Montana, or requirements applicable to federal grants, such as 2CFR200 Uniform Grant Guidance. The information in this guide does not include all legal requirements of managing an AmeriCorps grant, nor does it constitute CNCS’ official interpretation of the law, regulations, and policies related to AmeriCorps.

A Brief History of National Service

The United States has always relied on the dedication and action of engaged citizens. The Corporation for National and Community Service (CNCS) advances the ethic of civic engagement by providing opportunities for Americans to improve communities through service, while simultaneously learning and growing. <https://nationalservice.gov/about/who-we-are/national-service-timeline>

The Civilian Conservation Corps

During the 1930s Great Depression, President Franklin D. Roosevelt created the Civilian Conservation Corps, known as the CCCs. In response to his call to service, 4 million young people joined, restoring the nation’s parks, revitalizing the economy, and supporting their families. For 11 years the CCCs provided billions of dollars in service and allowed millions of families to live in dignity. Learn more at, <https://www.history.com/topics/great-depression/civilian-conservation-corps>

The GI Bill- the Servicemen’s Readjustment Act of 1944

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 our country. Veterans improved their lives by attending college and contributed mightily to America’s future. With the education they received, those citizens sparked the economic boom that helped make America the world’s leading economy in the 20th century.

Peace Corps

In 1961 President John F. Kennedy’s inaugural address issued a call to service by challenging Americans to “ask not what your country can do for you, ask what you can do for your country.” JFK went on to create the Peace Corps. Peace Corps engages 6-7 thousand people into international service annually to meet needs of people and places. After service, Returned Peace Corps Volunteers (RPCV) put their experience and gained knowledge to work at home, in the spirit of citizenship, changing America for the better. Learn more at, <https://www.peacecorps.gov/>

The War on Poverty

In 1964, President Lyndon B. Johnson brought the spirit of the Peace Corps home to America by creating Volunteers in Service to America (VISTA). VISTA, now part of AmeriCorps, funds projects under the Domestic and Volunteer Service Act of 1973. VISTA projects are sponsored by public agencies and nonprofit organizations who place service members to improve the condition of people living in underserved, low-income communities throughout the US and Indian Nations. Other initiatives such as Retired and Senior Volunteer Program (RSVP), Foster Grandparent Program (FGP), and Senior Companion Program (SCP) were also developed to engage older Americans in service.

Revival of Interest in National and Community Service

In 1989, President George H. W. Bush sparked a revival in National Service when he instituted the White House Office of National Service. 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, including some here in Montana!

Initiatives included Learn and Serve programs that involved youth in service and service-learning in school and community activities; Higher Education Innovative Projects involving college students in service and promoting service at educational institutions; American Conservation and Youth Service Corps, supported summer and year-round youth corps initiatives to engage both in- and out-of-school youth in service; 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 meet needs here at home, was enacted later as part of the 1993 Defense Authorization Act. NCCC is a residential service program modeled on the Depression-era Civilian Conservation Corps and the US military that continues today.

National and Community Service Trust Act

President Bill Clinton signed the National and Community Service Trust Act into law on September 21, 1993. The legislation created a new federal agency, the Corporation for National and Community Service (CNCS) to administer National Service resources. The law created AmeriCorps, which was designed to support local, state, and national organizations across the nation by engaging Americans in results-driven service. CNCS took over management of two previous agencies, ACTION, which was responsible for running VISTA and the National Senior Service Corps, and the more recent Commission on National and Community Service, including the NCCC, forming the network of National Service we see today.

President George W. Bush called on all Americans to serve their country for 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 worked to expand and strengthen federal service programs like Peace Corps, Citizen Corps, AmeriCorps, and Senior Corps, and to raise awareness and break down barriers to service opportunities within all federal government agencies.

The Serve America Act

On April 21, 2009, President Barack Obama signed the Edward M. Kennedy Serve America Act. The Serve America Act reauthorized and expanded National Service administered by the Corporation for National and Community Service by amending the National and Community Service Act of 1990 and the Domestic Volunteer Service Act of 1973. <http://www.nationalservice.gov/about/legislation/edward-m-kennedy-serve-america-act>

Organizational Structure

Corporation for National and Community Service (CNCS), Created in 1993, CNCS supports National Service at national, state and local levels, overseeing three main initiatives:

- AmeriCorps – members serve with local and national organizations to meet community needs and upon successful completion, receive Education Awards (AmeriCorps State & National, VISTA and NCCC)
- Learn and Serve – authorized in Legislation however defunded in 2011, provided support to schools, higher education institutions and community-based organizations, to engage students, teachers, and others in service-learning; and
- Senior Corps, Americans 55 and older contribute skills and experience to their peers, elementary school students and the community (RSVP, Foster Grandparents and Senior Companions)

AmeriCorps operates in a decentralized manner that gives significant administrative responsibility to states and nonprofits. This table suggests some of the support that CNCS may provide:

| CNCS Office | AmeriCorps Support Functions |
|---------------------------------------|--|
| Program Office | Oversees programmatic aspects of grants and awards. Program Officers serve as primary liaisons with state Service Commissions & National Program grantees. |
| Grants Office | Oversees financial aspects of grants and awards. |
| National Service Trust | Manages the Education Awards for AmeriCorps members. |
| Public Affairs | Oversees media relations, marketing, and publications, including the online recruitment website. Provides marketing and branding information to the field. |
| 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 (OIG) | Detects and deters waste, fraud, abuse, and violations of law of CNCS funded programs. http://www.cncsoig.gov/ |

CNCS Field Offices

For over 50 years, CNCS has operated state offices in most all states and some territories. In 2019, the CNCS Transformation and Sustainability Plan was implemented, resulting in regionalization of state offices that were part of CNCS's Office of Field Liaison (OFL). Regional offices are responsible for partnering with State Commissions, administering AmeriCorps VISTA and the three Senior Corps programs. The CNCS Senior Portfolio Manager, based in Denver, serves as an ex-officio member on the Montana Commission on Community Service. Learn more at, <http://www.nationalservice.gov/stateoffices>

Montana Commission on Community Service www.serve.mt.gov

For over 25 years, state service commissions have administered AmeriCorps State and community volunteer programs to address critical needs and engage citizens into service. State service commissions were created in the National and Community Service Trust Act as amended in 1993. State service commissions are essential state partners of the Corporation for National and Community Service. State service commissions are governor-appointed public agencies and nonprofit organizations made up of more than 1,110 commissioners - citizens leading the nation's philanthropic and service movement. The nation's 52 state service commissions operate at state and local levels, granting nearly \$425 million in federal funds in FFY2019, (\$412 million in FFY2018 & \$386 million in FFY2017). National Service grantees match the federal dollars with state and local resources to support citizen service and volunteerism in America. Combined, these funds support nearly 75,000 AmeriCorps members nationwide each year. Learn more, <http://www.nationalservice.gov/about/contact-us/state-service-commissions>

The Montana Commission on Community Service is a diverse, non-partisan, Governor-appointed body representing a broad cross-section of service interests and statewide leadership in Montana. The Commission oversees the Governor's Office of Community Service (OCS). OCS is a state agency funded by CNCS and the State of Montana. The Montana Commission serves as an independent non-partisan governing body which assumes responsibility for distribution, administration, and expenditure of funds related to AmeriCorps State subrecipients and the Governor's Office of Community Service.

The Montana Office of Community Service strengthens civic engagement in the state by:

- Encouraging citizens regardless of age or income, to engage in National Service and community volunteerism.
- Calling young people to serve in projects that benefit communities, landscapes, and people to improve their success through acquiring literacy, job skills, and interpersonal skills.
- Building on existing organizational framework of state and local government entities to expand full and part-time service opportunities for all citizens, particularly youth and older Montanans.
- Involving participants in activities that would not otherwise be performed by employed workers.
- Establishing programs to accomplish diverse, meaningful, sometimes labor-intensive service that leads to improvements for citizens and public places across Montana. This is done through subaward agreements/contracts that grant dollars, service positions, and Education Awards to deliver the specific service to be performed.

State Education Agencies - Montana Office of Public Instruction <http://opi.mt.gov/>

Learn and Serve America grew from Serve America, a program created under the National and Community Service Act of 1990. In 1993 when CNCS was created Serve America was reformed as Learn and Serve America, also referred to as Learn & Serve. Learn and Serve America was again reauthorized in the 2009 Edward M. Kennedy Serve America Act. While still authorized in the Serve America Act today, in 2011 the US House Appropriations Committee eliminated the budget for Learn and Serve America. Until 2011, the Montana Office of Public Instruction received and administered the school-based Learn and Serve funds. A seat on the Montana Commission of Community Service is for a representative of the State Education Agency.

AmeriCorps Programs - <http://serve.mt.gov/ameri-corps-in-montana/>

AmeriCorps State

CNCS relies upon State Service Commissions to administer 78% (2016) of its AmeriCorps budget via grants to public and nonprofit organizations that sponsor national 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.

- Note: AmeriCorps State programs based outside of Montana, planning or discovered to be operating in Montana are expected to complete a consultation like National Directs. If the AmeriCorps State program from another state or territory fails or refuses to consult with the Commission, OCS may contact the State Service Commission that is responsible for that program to request information and communication regarding the activities in Montana.

AmeriCorps National Direct

AmeriCorps National Direct grantees leverage program funds directly from CNCS to provide AmeriCorps service 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.

AmeriCorps NCCC (National Civilian Community Corps)

NCCC is a 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 teambuilding. Members are ages 17-24 who live and train at campuses in Denver, CO, Sacramento, CA, Vicksburg MS, and Vinton, IA. From those locations, teams are deployed to provide direct service to multiple states. AmeriCorps NCCC conducts service projects in partnership with local and state sponsors. NCCC has a specific focus on disaster response, called FEMA Corps in Vicksburg MS. <https://www.nationalservice.gov/programs/ameri-corps/ameri-corps-programs/ameri-corps-nccc>

AmeriCorps VISTA (Volunteers In Service To America)

Members serve income eligible-income communities and families across the country for one calendar year. VISTA members live in communities where they serve, creating or expanding initiatives that can continue after they complete service. AmeriCorps VISTA members serve with local project sponsors and focus on indirect service, such as building capacity, mobilizing resources and increasing self-reliance.

National Direct Consultation

The Edward M. Kennedy Serve America Act requires that each applicant proposing a multi-state National Direct AmeriCorps program must consult the State Service Commission in each of the states where they intend to operate the proposed multi-state program. CNCS clearly outlines this requirement in the Notice of Funding Opportunity. **The Montana Commission expects all National Direct applicants, (new, recompetes, and continuation) will fully engage in *Coordination among State Commission & National Direct Applicants* section outlined in CNCS’s Notice Of Funding Opportunity at each stage of the Award.**

The Montana Commission uses the National Direct Consultation Single Form provided by America’s Service Commission (ASC)s. The link to the Consultation Form is accessible on the home page of <http://serve.mt.gov/> and <https://www.statecommissions.org/national-direct-consultation>

The Montana Governor’s Office of Community Service (OCS) appreciates the consultation process to connect meaningful partnerships and to promote the use of National Service as an effective strategy to address unmet needs in communities throughout our state.

Through the National Direct consultation process, OCS aims to:

- Understand and be familiar in the scope and impacts of National Service operating in Montana.
- Connect National Direct programs to geographic areas with little or no National Service presence to meet needs identified in the Montana State Service Plan.
- Effectively use limited resources for cross-stream collaboration, member training, and other events that will lead to positive member experiences and increased public awareness of AmeriCorps service in Montana.

National Directs placing members in Montana are expected to participate in the annual ServeMontana Symposium and to communicate with the Commission to share information on site and member recruitment, training, National Days of Service and other relevant activities throughout the year.

OCS uses the information provided through the National Direct Consultation process to provide input to CNCS on funding decisions that may impact our state, and to provide feedback/recommendations to the National Direct applicant. CNCS asks each Commission to provide input on each National Direct applicant whose grant proposes to place members in the state by selecting “support”, “neutral”, or “do not support”, along with any comments associated with the opinion submitted.

Chapter Two

AmeriCorps State Grants

In general, the purpose of an AmeriCorps State grant is to initiate, improve, or expand the ability of an organization and community to provide service to address unmet environmental, educational, public safety (including disaster preparedness and response), and other human needs. In Montana, OCS strives to connect AmeriCorps resources to meet the goals and objectives of the Montana State Service Plan. AmeriCorps has a dual mission, to meet community needs while simultaneously developing contributors in the areas of leadership and citizenship.

This manual is intended to guide two streams of AmeriCorps State grant funding in Montana. The two basic types of funding are formula funding, awarded at the state level, and competitive funding, which is awarded at the national level. Formula funding is based on a population driven formula and awarded to State Commissions to fund AmeriCorps programs. Competitive funding is awarded to Commissions, with all subrecipient funding determinations made by CNCS. The determination as to if an application is submitted at the competitive level or not, is given to the state commission and is based on the strength of the application and organization. Whether it is a competitive or formula grant, awards are made for three years, with annual continuation applications. Each three-year cycle is referred to as a recompetes. As a general rule, any program completing their second three-year cycle under formula funding will be assessed and, in some cases, required to apply for competitive funds. When feasible, funds are available for planning grants which provide a one-year budget period for an organization to develop a full AmeriCorps program. Planning grants do not have members or performance measures.

Grant Funds and Service Activities

Grant Funds, AmeriCorps grants provide dollars, service positions and Education Awards. CNCS does not fully fund any program. AmeriCorps State and National grants fund one of two types of cost reimbursement grants.

- **Line Item:** Is a grant with a complete budget, the subrecipient must garner, expend and report on federal and grantee shares. A first-time successful applicant is required to match at 24 percent for the first three-year funding period. Starting in year four, the match requirement gradually increases each year to reach 50 percent by year ten, according to 45 CFR 2521.60.
- **Fixed-Amount:** Is a grant with a total budget consisting only of number of MSY and cost per MSY. The amounts are identified in the Notice of Funding Opportunity (NOFO) and with application instructions issued each year. There is no minimum match requirement for fixed-amount grants. While fixed-amount grantees provide the resources needed to operate the program, they are not required to track or report on those shares to CNCS. The fixed amount grant does not cover all costs. Fixed amount of grant reimbursements is based on AmeriCorps member enrollment, service hours, and retention rates. For a subgrantee to access the whole Fixed amount award, 100% retention must be achieved. **Tip:** *Fixed Award grantees should identify who in the organization is grant covered and comply with NSCHC appropriately.*

Eligible Activities, 45 CFR 2520, http://www.nationalservice.gov/pdf/45CFR_chapterXXV.pdf

The first key to determining the eligibility of a service activity is whether it falls within the CNCS Focus Areas: Disaster Services, Education, Environmental Stewardship, Healthy Futures, Economic Opportunity, and Veterans and Military Families. From there, it is the responsibility of the legal applicant to demonstrate that one or more of the priority areas are being met in a proposal and in service activities. Within each priority area, AmeriCorps members provide *direct service* and/or *capacity building* activities that initiate, improve, or expand the capacity of an organization and community to meet the needs of those it serves.

Direct service activities refer generally to activities that provide a visible, measurable benefit to an individual, a group, or a community. Some examples are:

- Mentoring young adults in schools and communities.
- Engaging in community clean-up projects, trail maintenance and winterization.
- Providing information to vulnerable populations, and access to justice.
- Providing information and/or services to an area affected by disaster.

Capacity building activities increase an organizations ability to deliver their mission and are included in, or consistent with, the approved grant application. Some examples are:

- Strengthening volunteer management and recruitment.
- Conducting outreach and securing resources in support of service activities that meet specific needs in the community.
- Helping build the infrastructure of the sponsoring organization.
- Developing collaborative relationships with organizations working to achieve similar goals in the community, such as nonprofits, faith-based organizations, foundations, local government, institutions of higher education and local education agencies.

Member Development Activities, CFR§2520.50

No more than 20 percent of the aggregate of all AmeriCorps member hours in the program, as reflected in the member enrollments in the National Service Trust, may be spent on education and training, program and or site-specific training. ServeMontana Symposium attendance, orientations, in-service training, Life After Service training and similar development events as approved by the program, the service site, and the Governor’s Office of Community Service.

Fundraising Activities, 45CFR§2520.40

AmeriCorps members may raise resources directly in support of the program's service activities. An AmeriCorps member may spend no more than ten percent of the Term of Service, as reflected in the member enrollment in the National Service Trust, performing fundraising activities.

Examples of fundraising activities AmeriCorps members may perform include, but are not limited to:

- Seeking donations of books for a program in which volunteers teach children to read;
- Writing a grant proposal to a foundation to secure resources to support the training of community volunteers;

- Securing supplies and equipment from the community to enable volunteers to help build houses for low-income individuals;
- Securing financial resources from the community to assist in launching or expanding a program that provides social services to the members of the community and is delivered, in whole or in part, through the members of a community-based organization;
- Seeking donations from alumni of the program for specific service projects being performed by current members.

AmeriCorps members *may not*:

- Raise funds for living allowances or for an organization's general (as opposed to project) operating expenses or endowment;
- Write a grant application to the Corporation or to any other Federal agency.

Ineligible Service Categories, Activities and Use of Grant Funds

There are activities which grant funded staff and members may not participate in while on duty or perceived to be on duty. There are specific types of organizations whose mission may fit the eligibility criteria but are expressly prohibited from receiving AmeriCorps funding under federal law. This section is intended to provide a general outline, for full descriptions of the topics discussed in this section refer directly to AmeriCorps legislation.

Prohibited Activities http://www.nationalservice.gov/sites/default/files/documents/acprohibited_activities.pdf

While charging time to the AmeriCorps program, accumulating service or training hours, or otherwise performing activities supported by the AmeriCorps program or the Corporation, staff and members may not engage in the following activities, see 45 CFR § 2520.65:

- Attempting to influence legislation;
- Organizing or engaging in protests, petitions, boycotts, or strikes;
- Assisting, promoting, or deterring union organizing;
- Impairing existing contracts for services or collective bargaining agreements;
- Engaging in partisan political activities, or other activities designed to influence the outcome of an election to any public office;
- Participating in, or endorsing, events or activities that are likely to include advocacy for or against political parties, political platforms, political candidates, proposed legislation, or elected officials;
- 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 worship, maintaining facilities primarily or inherently devoted to religious instruction or worship, or engaging in any form of religious proselytization;
- Providing a direct benefit to—
 - A business organized for profit;
 - A labor union;
 - A partisan political organization;
 - A nonprofit organization that fails to comply with the restrictions contained in section 501(c)(3) of the Internal Revenue Code of 1986 except that nothing in this section shall be construed to prevent participants from engaging in advocacy activities undertaken at their own initiative; and

- e. An organization engaged in the religious activities described in paragraph (g) of this section, unless Corporation assistance is not used to support those religious activities;
- i. Conducting a voter registration drive or using Corporation funds to conduct a voter registration drive;
- j. Providing abortion services or referrals for receipt of such services; and
- k. Such other activities as the Corporation may prohibit.

AmeriCorps members may not engage in Prohibited Activities directly or indirectly by recruiting, training, or managing others for the primary purpose of engaging in one of the activities listed above. Individuals may exercise their rights as private citizens and may participate in the activities listed above on their initiative, on non-AmeriCorps time, and using non-Corporation funds. Individuals should not wear the AmeriCorps logo while doing so.

- CNCS urges that the Prohibited Activities be posted at program offices and all service locations.

Nonduplication and Nondisplacement (42 U.S.C. 12584a)

- Nonduplication— Assistance provided under National Service laws shall be used only for a program that does not duplicate, and is in addition to, an activity otherwise available in the locality of such program.
- Nondisplacement—An employer shall not displace an employee, position, or volunteer (other than a participant under the National Service laws), including partial displacement such as reduction in hours, wages, or employment benefits, as a result of the use by such employer of a participant in a program receiving assistance under National Service laws.
- Private Nonprofit—Assistance made available under National Service laws shall not be provided to a private nonprofit entity to conduct activities that are the same or substantially equivalent to activities provided by a State or local government agency that such entity resides unless Nondisplacement requirements are met.

Other Requirements

Insurance Coverage

Subgrantee organizations must provide OCS proof of general liability and motor vehicle insurance, both with policy limit amounts meeting the requirements outlined in the subaward contract. Members engaged in both on- and off-site project activities must be covered. Agencies should review current policies to ensure they cover non-employees in special statuses, such as AmeriCorps members.

Generally, insurance costs are an allowable expense and may be charged to the grant as an administrative cost on a pro-rated basis or included in program match. If insurance is included in the approved budget, insurance purchased specifically for the AmeriCorps program may be charged as a direct program cost.

Disability Inclusion

All AmeriCorps subrecipients are urged to reach out across Montana and nationwide to recruit members with diverse backgrounds who are qualified to contribute their unique set of perceptions, skills, and life experiences to the program and the community served. Programs and service activities must be accessible to people with disabilities, and subrecipients must provide reasonable accommodation for known mental or physical disabilities of otherwise qualified members, service recipients, applicants, and program staff.

- In all cases, member selection must be based on the applicant's qualifications and if they can perform the essential service activities, with or without reasonable accommodation.
- All selections and project assignments must be made without regard to the need to provide reasonable accommodation. Subrecipients 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 is a program required to make accommodations that are unduly burdensome or that will alter the program design fundamentally. However, all determinations must be documented.

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. Once an individual discloses a disability and requests an accommodation, evaluate the organizations capacity to provide the accommodation. In many cases individuals will know what they need and how to secure it. In other cases, individuals will not be certain what they need.

When an individual discloses a disability and requests an accommodation that involves getting or modifying equipment, or structural changes, subrecipients are strongly encouraged to utilize technical assistance resources. There are knowledgeable resources available to assist both you and the individual in evaluating appropriate and effective accommodations. Often practical, cost-effective reasonable accommodations that are cost effective and practical can be identified and implemented.

- CNCS's National Service Inclusion Project www.serviceandinclusion.org
- ServeMontana <http://serve.mt.gov/>
- Job Accommodation Network (JAN) is an available, no cost resource 800.526.7234 <http://askjan.org/>
- Independent Living Centers (ILCs) are federally funded and exist nationwide to provide assistance. <http://www.ilru.org/projects/cil-net/cil-center-and-association-directory-results/MT>

Providing Accommodations: Financial and Administrative Burden

Under the Rehabilitation Act, grant Terms & Conditions, and the contract with OCS, your organization must provide accommodation upon request by a qualified individual with disabilities, unless doing so is an undue financial or administrative burden. This is a high standard. In some cases, you may receive requests for accommodations that are unduly disruptive to the program or are expensive. Being difficult to achieve, time-consuming, or costly, do not meet this standard. 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 legal requirements when adjusting hours for participants. AmeriCorps State subrecipients 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.

First determine if your program has consistently applied these requirements to all participants. Strict adherence to the legal requirements to deny a person an accommodation for their 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 serve 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 12-month 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:
 - Place 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 the overall size of the entire organization (not just the AmeriCorps program) – number of employees and participants; number and type of facilities; and size of budget.

1. The organizations design, including the composition and structure of your entire organization's work force and service force.
2. 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 justify the undue burden claim.

In some cases, funds may be available from CNCS and/or the State Commission to assist in paying for accommodations by reimbursement. If available, funds may not be used to assist in meeting basic

accessibility and accommodation requirements but are prioritized for the program to be more accessible than the minimum requirements mandated to provide reasonable accommodation. If providing an accommodation would be an undue financial burden for your organization, funds may be available on a case by case basis.

OCS Diversity, Equity, and Inclusion (DEI) Statement

During a DEI cohort, OCS developed a DEI statement to present to the Commission. On March 4, 2020, the Commission approved this statement with the intention to promote diversity, equity, and inclusion among the OCS office and AmeriCorps State in Montana. This statement may be adapted and adopted by AmeriCorps programs in Montana if they so choose.

The Governor's Office of Community Service (OCS), also known as ServeMontana, affords individuals the opportunity to reach their fullest potential by recognizing, respecting, and engaging the unique backgrounds, experiences, and perspectives they bring to national service and community volunteerism in Montana.

OCS Inclusion & Accommodation Assessment - <http://serve.mt.gov/AmeriCorps/program-directors>

In the spring OCS issues the AmeriCorps Inclusion & Accommodation Assessment. The Assessment is an anonymous survey, and the goal is to have all active members respond. The results of the Assessment are compiled and presented to the Commission at each Quarter Two meeting and are posted online.

AmeriCorps Progress Reports (APR) - <http://serve.mt.gov/AmeriCorps/program-directors>

Each AmeriCorps subrecipient is required to submit AmeriCorps Progress Reports. Progress reports monitor performance measures, assess program strengths and challenges, and highlight unique program/member achievements as well as other reporting required by the CNCS/OCS. Operating programs submit progress reports biannually and planning grants submit reports quarterly.

The Program Progress Reports are due the 20th of the month after the end of the reporting period and should be submitted to the OCS Grants Manager.

- 9.1 – 3.31 Period of Reporting Due 4.20
- 4.1. - 9.30 Period of Reporting Due 10.20
- For program year ending after 9.30 then the report for the period ending 12.31 is due 1.20

At a minimum, subrecipients must ensure: 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 identified.

Financial reports are dependent on grant type. Late or inaccurate progress and financial reports are considered indication of poor performance, increase risk, and may impact future funding recommendations.

Extension requests for program and financial reports should be made prior to the due date.

Chapter Three

Affiliation, Recruitment, and Member Benefits

AmeriCorps Affiliation

AmeriCorps Terms & Conditions dictate “the grantee must identify the program as an AmeriCorps program and members eligible for an Education Award as AmeriCorps member.” This does not mean “AmeriCorps” must be in the name of the program, however the program must identify itself and its service locations as associated with AmeriCorps.

Further, “[t]o establish the relationship between the program and AmeriCorps, the subrecipient should use the phrase ‘The AmeriCorps National Service Network’ or ‘an AmeriCorps program’ or ‘a proud member of the AmeriCorps National Service network’”.

- Donors to subrecipients may not use the AmeriCorps name or logo in advertising or 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.

Ethic of Service

The centerpiece of the AmeriCorps ethic is summed up in the motto “Getting Things Done”. The dual mission is to strengthen communities and develop members’ leadership ethic & civic responsibility. To create an *esprit de corps* for members, programs are encouraged to plan based on “classes or cohorts” of members who begin and “complete/end service” at or near the same time.

Orientation sessions for staff, site supervisors, and members should include discussion on the national scope of AmeriCorps, an explanation of how the program fits into the AmeriCorps network, and the Montana State Service Plan. Appropriate opening ceremonies, including issuing the AmeriCorps Pledge, are important for all members. Program staff are encouraged to engage community leaders and elected officials in such events, as appropriate. Subrecipients should arrange for members to participate in cross-stream activities such as the ServeMontana Symposium, National Days of Service, Martin Luther King, Jr. Day and other development opportunities sponsored by State Commissions or by CNCS.

CNCS Branding and Messaging Guide

AmeriCorps grantees are required to use approved AmeriCorps branding and messaging. CNCS and OCS expect subrecipients, staff, site supervisors, and members will comply with the CNCS Branding and Messaging Guidance as it pertains to logos, terminology and more. Recipients of AmeriCorps resources are strongly encouraged to place signs that include the AmeriCorps name and logo at service sites and may use the slogan “AmeriCorps Serving Here.” During introductions and public speaking opportunities, AmeriCorps participants must state they are AmeriCorps members serving. CNCS issues Branding and Messaging Guidance. Noncompliance may result in corrective action or disallowed costs.

- <http://www.nationalservice.gov/documents/ameriCorps/2016/ameriCorps-branding-and-messaging-guidance>

Logos the AmeriCorps Montana logo should be used whenever and wherever appropriate. Contact OCS Outreach staff to request the logo file.

CNCS provides logos for use here: <http://www.nationalservice.gov/newsroom/outreach-resources/logos>

To maintain uniform AmeriCorps identity, written permission from CNCS is required prior to,

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

Service Gear and Promotional Items

For a program to identify with AmeriCorps (except Education Award only Programs (EAP)) each, “must use the AmeriCorps name and logo on service gear and public materials such as stationery, recruitment brochures, online service listing or other recruitment strategies, orientation materials, member curriculum, agendas, forms, signs, banners, press releases, and publications related to their AmeriCorps members”.

Service Gear

- Approved AmeriCorps gear: <http://www.nationalservicegear.org/>
- Good Deed Organization: <http://gooddeed.org/>
- Complimentary publications & promotional items: <https://pubs.nationalservice.gov/Default.aspx>

Promotional items

- AmeriCorps Materials Request Form, includes recruitment materials
http://www.nationalservice.gov/sites/default/files/documents/ac_materials_request.pdf
- Publications library <https://pubs.nationalservice.gov/>
- National Service Photos: <https://www.flickr.com/photos/nationalservicephotos/>

In addition to the CNCS publications (handbooks, manuals, recruitment, and marketing materials), subrecipients often develop their own materials. To demonstrate affiliation with AmeriCorps, you are expected to use the AmeriCorps name and logo. Publications 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.”

Except for safety equipment, *grantees may only charge the cost of member service gear to the federal share if it includes the AmeriCorps logo.* All safety gear may be charged to the federal share, regardless if it includes the AmeriCorps logo. Grantees may add the AmeriCorps logo to program specific gear,

including a uniform, using federal funds. All other nonbranded service gear must be purchased with non-grant funds.

In addition to AmeriCorps service gear, there are other ways the common look and affiliation may be achieved. Some of these items are allowable to the grant.

- Participants should identify as AmeriCorps members and appropriately describe AmeriCorps service. Members and the community should know they are AmeriCorps members serving, not workers or volunteers.
- Signs should identify sites as AmeriCorps service sites/service locations/host sites.
- Program staff, site supervisors, and members should be able to discuss AmeriCorps with stakeholders and members of the public.
- Stationery, brochures, newsletters, and more should identify the program as AmeriCorps and include the logo.
- Press releases and other public materials should acknowledge the program as part of the AmeriCorps National Service network.

AmeriCorps Recruitment

This section provides basic strategies that can be adapted to recruit members and information on how to successfully tap into the national pool of applicants. Each AmeriCorps program should have a written recruitment plan outlining the practical strategy for both local and national recruitment. This should include position descriptions for members and site supervisors, a list of target audiences who are well-suited for service, and ways to make sure the groups are aware of your program's available positions.

<https://www.nationalservice.gov/resources/recruitment/volunteering-america-resources>

CNCS & OCS expects program recruitment to engage individuals nationally and from local communities where the service occurs. Be encouraged to target recruitment to as diverse an audience as possible and appropriate. Diversity is important and can be represented in many ways: age, gender, economic status, education background, race and ethnicity, skills, physical abilities and others.

Developing a Recruiting Message

After developing a list of target groups, think of different ways to market the AmeriCorps message to each group. Vary your approach slightly because not all people respond to the same message. Below are some basic "selling" points:

- connect with others to make a difference
- gain job skills and career networks
- travel/meet new people/adventure
- appeal of AmeriCorps and service
- give back to your community
- defer qualified student loans
- education award to pay off student loans and/or for post-secondary education
- opportunity to apply education and experience to serve communities

Target your materials What would attract an applicant to your program? Ask current members what attracted them! Applicants want to know what they'll be doing and what they'll gain. Target your approach to specific audiences such as degree departments at institutions of higher ed. For example, if the AmeriCorps opportunity focuses on education, advertise to education majors the valuable classroom experience they will gain as AmeriCorps members. Ask your current members to comment on your existing materials and give either formal or informal feedback. Even though you don't need to incorporate all their comments you are likely to receive some useful information

Make it personal. Personal contact makes the difference. Use your alumni (or current members on non-service hours) to attend a local state fair, conference, or school career day to share their experiences. Consider holding an information session with the contacts 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 with a postcard, phone call, or email to invite them to take the next step. Offer them suggestions on completing the application. Often people apply to serve with multiple AmeriCorps opportunities, so it is important to be responsive and maintain contact. If the applicant is better suited for another opportunity in Montana, please connect them to that program's staff.

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. They may even have a list of people they were unable to place who could be perfect for your program. Contact other National Service programs in your area, including AmeriCorps VISTA and Senior Corps.

Create a 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 the program holds for them.

Application Forms and more,

To the extent possible, all applicants should use the My AmeriCorps system to apply to service opportunities. More on My AmeriCorps and the CNCS website in the next section.

- If an applicant cannot use the My AmeriCorps system then a paper form may be acceptable and if approved, subrecipient staff may complete the official enrollment.
- If requested, subrecipients must make forms available in alternative formats.

National Recruitment Website <https://my.americorps.gov/mp/login.do>

My AmeriCorps is the web-based system for the recruitment, selection and placement of AmeriCorps members. The system allows individuals to learn about AmeriCorps service opportunities throughout the country, search for opportunities based on selected criteria, and apply online. Program staff initiate a

member service listing to list each of the service opportunities, receive applications and select applicants. Using My AmeriCorps program, staff can reach out to potential applicants.

My AmeriCorps is intended to generate interest in serving in AmeriCorps, simplify the application process, and increase customer service to program staff and potential applicants. To access the system for recruitment, an authorized program staff accesses eGrants. The recruitment and member management system side of eGrants is referred to as 'the Portal'.

- New to AmeriCorps? Create an eGrants account to post opportunities, search for potential applicants, contact applicants, review applications and select members.
<https://egrants.cns.gov/espan/main/login.jsp>
- A procedure is in place for applicants without internet access to become users by means of contract staff available via the toll-free number 800.942.2677.

All AmeriCorps Position Descriptions* are required to be listed in the My AmeriCorps Portal.

Subrecipients must list member position descriptions as Service Opportunities in the Portal. CNCS guidance on member listings <http://www.nationalservice.gov/resources/ameriCorps/member-assignment-listings>.

- Process: Subrecipients submit member recruitment listings for each service opportunity to CNCS for posting on My AmeriCorps. If the listings are compliant, they are approved and posted. If the listing is not compliant, CNCS may return it to the OCS Grants Manager with the requested changes. The OCS Grants Manager will send the program staff an email requesting changes and resubmit for CNCS approval.

While posting on My AmeriCorps is required, be encouraged to post service opportunities far and wide. The following links are from Program Directors, if you have an addition to make, please share with the OCS Grants Manager.

- Association of Latino Professional for America (APLFA)- <https://www.hispanicaccess.org/>
- <https://www.coolworks.com/>
- <https://www.experience.com/>
- Greening Youth Foundation- <https://www.gyfoundation.org/>
- Hispanic Access Foundation- <https://www.hispanicaccess.org/>
- Historically Black Colleges and Universities- <http://hbcu.com/cgi-bin/jobs/index.cgi>
- www.indeed.org
- <https://www.monster.com/>
- <https://www.volunteermatch.org/>
- <https://www.workforgood.org/>

*More on position descriptions on page 34.

Member Enrollment

Effective July 3, 2019, individuals selected for service must be enrolled within 8 calendar days of the start date. CNCS seeks to ensure all AmeriCorps members have verified citizenship status, a valid Social Security Number (SSN) verified by the Social Security Administration via eGrants, or be manually verified by one or both of their citizenship status if not verified in eGrants; all AmeriCorps members have had compliant NSOPW checks run and verified by a program staff; and all AmeriCorps members have had the other required criminal history checks initiated and attested to by a program staff member **BEFORE** they begin service. **Tip:** 8 days includes the start date! [ASN Enrollment and Enrollment Date Change Policy](#)

To enroll an individual in the Portal the enrollment form requires:

- Citizenship and Social Security Number must be certified as verified
- NSOPW and State/FBI checks must be certified as initiated

CNCS Member Enrollment guidance:

<https://www.nationalservice.gov/build-your-capacity/grants/manage-ameri-corps-state-and-national-grants>

Member Orientation

The grantee must conduct an orientation for members designed to enhance member safety and sensitivity to the community. Orientation should cover member rights and responsibilities, including code of conduct, Prohibited Activities (including those specified in the regulations), requirements under the Drug-Free Workplace Act of 1988 (41 U.S.C. 701 *et seq.*), suspension and termination from service, grievance procedures, sexual harassment, non-discrimination issues, and program specific topics to ensure success. Orientation sessions for staff, site supervisors, and members should include a discussion on the national scope of AmeriCorps, and explanation of how your local program fits into the Montana and nationwide AmeriCorps network of national service.

Core topics for member orientation should include, at a minimum

- National Service: the big picture and the dual mission of AmeriCorps.
- An overview of the history and nationwide importance of National Service including:
 - ✓ The history of service in America
 - ✓ A discussion of the AmeriCorps ethic
 - ✓ The meaning of community
 - ✓ The doors of opportunity that will open through service
 - ✓ Responsibilities individuals have to themselves, their families, the community, and the nation.
- Information about the community or natural environment where the service will occur.
 - The community need the service addresses
 - Member safety
- Program rules, regulations, & benefits (review member service agreement & program handbook)
 - ✓ Drug Free Workplace Act of 1988
 - ✓ Sexual harassment and other discrimination issues
 - ✓ Grievance procedure

- ✓ Making up missed service hours
 - ✓ Prohibited Activities
 - ✓ Release: personal compelling, or for cause
 - ✓ Rules of conduct
 - ✓ Safety protocol
 - ✓ Suspension & Reinstatement
- Program operating policies
 - ✓ Benefits
 - ✓ Living allowance
 - ✓ Program objectives & how to collect data for performance measure and/or evaluation
 - ✓ Staff and member roles
 - ✓ Timesheets
 - ✓ Training calendar
 - ✓ Travel and expense reimbursement policies

AmeriCorps Pledge

During pre-service orientation, at the completion of pre-service training, or at another appropriate time, members should be asked to take the AmeriCorps pledge. Typically, the Pledge is issued to members by program staff, a staff of OCS, a Commissioner, or an elected official, such as the Governor, Lieutenant Governor, a Tribal official or a local government official, such as a mayor. Members being inducted should stand, raise their right hand and repeat line by line, after the official.

*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.*

Member Development

Remember, a program may allocate no more than 20 percent of the aggregate required service hours to education and training. *This rule applies to programs, not individual members. Each program should have a written policy on earning hours per category.*

Programs are required to provide members with the training, skills, and knowledge they need to succeed in service.

Examples of training for assigned service activities:

- skills training (mentoring, providing legal information, trail maintenance and construction, etc.)
- recruiting, training, and retaining community volunteers
- cross-cultural competency
- team building
- program and site-specific training

Examples of in service and end of service member training:

- citizenship, civic engagement
- communication and listening styles
- Community Building Institute (CBI)
- accommodation of persons with disabilities
- conflict resolution
- CPR/first aid
- reflection activities
- Life After AmeriCorps Using Ed Award, describing service on your résumé and more!

National Days of Service

Several times throughout the year, AmeriCorps members are asked lead and participate in National Days of Service. This provides the opportunity to serve alongside community volunteers, other AmeriCorps members and members of other streams of National Service.

National Service days and other events include:

- Martin Luther King Jr. Day of Service (January)
- AmeriCorps Week (March) *attendance at the ServeMontana Symposium is required*
- Global Youth Service Day (April)
- 9/11 Day of Service and Remembrance (September)

AmeriCorps Member Benefits

Living Allowance

The National and Community Service Act of 1990, as amended, and the Serve America Act, requires AmeriCorps programs to provide full-time members with a living allowance. Each year the Corporation sets the minimum and maximum amount for member living allowance by slot type. The living allowance is not a wage as AmeriCorps members are not employees. Regarding the treatment of the member living allowance as income for purposes of determining eligibility for federal benefits programs, Commission Staff will continue to work with state and local agencies.

Outside Employment

Outside employment is NOT a member benefit, however it is allowable, and is in this section as the living allowance rate may influence an AmeriCorps member’s inclination to seek outside employment. Outside employment is allowable however must be at a location *other* than the AmeriCorps service site, or any

other project related organization where the AmeriCorps member serves and must not interfere with successful completion of the Term of AmeriCorps Service.

Before accepting outside employment, the AmeriCorps member is expected to obtain approval of the site supervisor and program staff. It is best practice this approval be written and retained in the member file. This is to ensure there is no conflict between the AmeriCorps service and the outside employment.

While in service, an AmeriCorps member may only accept outside employment for positions that are:

- Part time
- Do not conflict at all with the AmeriCorps service activities, or regularly scheduled service
- Do not conflict with AmeriCorps program requirements or policies, such as prohibited activities
- Compliant with all federal, state and local laws, and regulations

Remember there are likely tax implications to increased income from outside employment, and other impacts to pay attention to, such as effects on public benefits, income taxes, cost of income determined health benefit coverage, and potentially others, as per each individual's personal situation.

While outside employment is best addressed with the member, the service site, and the program, OCS reserves the right to determine if an AmeriCorps member's outside employment is adversely impacting member's service commitment.

Service Site hiring AmeriCorps members

Montana AmeriCorps program staff work hard to recruit, select, and engage citizens into service with eligible organizations across the state. It is expected each program has a policy prohibiting service locations from hiring AmeriCorps members until after their term of service is completed and includes corrective action/consequence for those sites who do not comply.

- While OCS encourages all organizations to sign on as an [Employer of National Service](#), the expectation is the active Term of Service will be honored.
- If a site is known to hire one or more AmeriCorps members before the term of service is complete, the site may be ineligible to host an AmeriCorps member, or receive AmeriCorps service in the future.

Health Care

Health care benefits must be made available to all full-time members and meet the standards established by the grant Terms and Conditions for the specific grant year. Health care benefits may be provided to members serving less than full time, but Corporation funds may not be used to support the cost. An exception is made for less than full time members who are performing service on a normal full-time schedule for a period of six weeks or more. These members are eligible for health care benefits and CNCS funds may be used. Dependent coverage is not an allowable grant expense.

https://www.nationalservice.gov/sites/default/files/page/AmeriCorps_Health_Care_FAQs_5_12_2014.pdf

Child Care

Eligible members may be eligible to receive subsidized childcare through Gap Solutions while participating in National Service. For more information on childcare benefits, eligibility, application documents and FAQ visit <https://www.americorpschildcare.com/> or call 855.886.0687

Eligibility requirements for AmeriCorps Childcare benefits include:

- ★ Must be an active member serving on a regular full-time schedule for at least six weeks.
- ★ Member must need childcare services to participate in AmeriCorps.
- ★ Member’s household income must not exceed the maximum amount under the Child Care & Development Fund (CCDF) Block Grant rules established by the state or territory in which the childcare services are provided.
- ★ The member must be a custodial parent or legal guardian of a child under the age of 13.
- ★ The child must be living with the member.
- ★ Once the member is approved and accepts the AmeriCorps childcare benefit, the member must not receive a childcare benefit for the same child from any other source.

Members not eligible for childcare benefits

Programs may choose to provide childcare benefits to less than full-time members from non-CNCS sources of funds. Less than full-time members may be eligible for childcare subsidies available through state-administered childcare assistance. Various state childcare programs are available to families who are on TANF, “at risk” of going on TANF, or losing TANF due to the AmeriCorps living allowance.

Eli Segal Education Award

<http://www.nationalservice.gov/programs/ameriCorps/alumni/segal-ameriCorps-education-award>

The Serve America Act links the value of AmeriCorps Education Awards to the maximum value of the Pell Grant and therefore the amount changes annually. Education Awards amounts for each slot type are determined by the grant year the applicant was awarded. This may be different than the amount advertised on the CNCS website.

| <i>Term</i> | <i>Hours completed</i> |
|--------------------|-------------------------------|
| Full-time | at least 1700 |
| Three Quarter Time | at least 1200 |
| Half time | at least 900 |
| Reduced half-time | at least 675 |
| Quarter time | at least 450 |
| Minimum time | at least 300 |

Requirements for Earning and Education Award (42 C.F.R. 2526.15)

The eligibility of a member to receive an Education Award is based upon an end of term evaluation that must be completed by a direct supervisor of that member. OCS best practice is to have the site supervisor and the member sign the evaluation. The end of term evaluation must assess three basic

points, which should also be spelled out in the member service agreement and position description. Has the member:

- Completed the required number of service hours for the term of service?
- Satisfactorily performed on assignments, tasks, or projects, and
- Met performance criteria as determined by the program and communicated to the member?

It is each program's responsibility to determine and certify members' eligibility for an Education Award. As such, the organization's grievance procedure should contain language pertaining to a member who exits without an Education Award.

Forbearance

Individuals serving in an approved AmeriCorps or Silver Scholar position may be eligible to postpone repayment of qualified student loans through an action called loan forbearance. While a loan is in forbearance it continues to accrue interest however, at successful completion of a term of service the National Service Trust may pay all or a portion of the interest accrued on the loan.

- Requests for forbearance and student loan interest can be made online through [My AmeriCorps](#).

Education Award Usage (42 U.S.C. 12604)

After a member has completed a term of service and the exit has been certified by the program, the Education Award will become available for disbursement through My AmeriCorps Portal. An individual has seven years from the end of service date to use the Ed Award. Not all schools and loans are eligible to receive Education Award payments. For eligible institutions see 42 U.S.C. 12604 or contact the National Service Trust. <https://www.nationalservice.gov/programs/amicorps/segal-amicorps-education-award>

In general, the Education Award may be used:

- to repay qualified student loans;
- to pay all or part of the cost of attendance or other educational expenses at a qualified institution of higher education;
- to pay expenses incurred in participating in an approved school-to-work program;
- to pay expenses incurred in enrolling in an educational institution or training establishment that is approved under 38 U.S.C chapter 36 or other applicable provisions of law, for offering programs of education, apprenticeship, or on-job training for which educational assistance may be provided by the Secretary of Veterans Affairs; and
- to pay interest expenses in accordance with regulations.

After completing service, members are considered Alumni/Alums. Alums may choose to split the Ed Award to pay a combination of any of the qualified educational expenses. The payment will be made directly to the school or loan holder designated by the individual.

Allowable Education Expenses 42 U.S.C. § 12604(c)

Current educational expenses include:

- "Cost of Attendance" for a degree- or certificate-granting program of study at a qualified school.
- Educational expenses for non-degree courses offered by qualified schools, such as continuing education courses.

The Education Award can be used at Title IV institutions of higher education (including graduate and professional programs), at the National Outdoor Leadership School (NOLS), and at qualified vocational schools. An institution is considered a Title IV school if it has an agreement with the U.S. Department of Education making its students eligible for at least one of the federally backed forms of financial assistance (*such as Pell Grants, Perkins Loans, Stafford Loans, National Direct Loans, and Federal Consolidated Loans*).

The Education Award can also be used at a program of education approved by the Secretary of Veterans Affairs. Beginning with terms of service that started on or after October 1, 2009, the Education Award may be used to pay expenses incurred in enrolling in an educational institution or training establishment that is approved under the GI Bill. To make sure the institution is qualified, check with the financial aid office or the National Service Trust.

Education Award Matching

Montana Campus Compact member institutions match the Education Award at varying levels,

- <http://www.mtcompact.org/awards-scholarships/segal-amicorps-education-awards/>

Nationwide list of institutions matching the Education Award, some match one to one!

- <https://www.nationalservice.gov/programs/amicorps/segal-amicorps-education-award/matching-institutions>

Qualified Loans

National Service legislation defines *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. Education Awards may be used to repay a student loan made by a state agency, including state institutions of higher education. AmeriCorps Education Awards may not be used to repay any other type of loan, even if the loan was obtained for educational purposes. The Education Award may be used to repay defaulted student loans if the loans meet the definition of *qualified student loan*. For questions if a specific loan type is qualified, contact the National Service Trust 888.507.5962

Interest Payments

Individuals who have successfully completed a term of service in AmeriCorps or Silver Scholars are eligible to have the Trust pay as much as 100% of the interest accrued on their qualified student loan during their service. The portion the Trust will pay is determined by the type of service (full or part-time) and the length of service period.

The Trust will not pay interest if the member failed to complete the term of service unless there is a compelling personal circumstance and the member earned a prorated award. An interest payment will only be made after successful completion of service and the individual has been provided the Ed Award.

Education Award Payments and Taxes

Interest payments, and all payments made with the Education Award, are considered by the IRS to be taxable income in the year in which the payment(s) are made. When and how much of the Ed Award is redeemed will likely impact the individual's overall income tax liability. The Trust DOES NOT deduct taxes from Education Award or interest payments. If the Education Award and interest payments total more than \$599.00 in a calendar year, in January of the following year, the Corporation will issue a Form 1099 to be used in income tax return preparation. The total sum of interest payments and the Segal AmeriCorps Education Award payments are listed together on the 1099 form.

Since the Ed Award is taxable, it is not a scholarship and should not be referred to as one.

<http://www.nationalservice.gov/programs/amicorps/alumni/segal-amicorps-education-award/tax-implications-education-award>

However, members may be eligible for other tax relief through the Taxpayer Relief Act of 1997.

For more information check the following resources:

- IRS <https://www.irs.gov/uac/about-publication-970> : IRS public contact = 800.829.1040.
 - To request IRS Publication 970, Tax Benefits for Higher Education, call (800.TAX.FORM (800.829.3676) or by download it from the IRS website

Transferring an Education Award

Legislation was passed in 2009 to allow eligible AmeriCorps Alums aged 55 years and older to transfer certain Segal AmeriCorps Education Awards to their eligible children or grandchildren. Learn more here:

<https://www.nationalservice.gov/programs/amicorps/alumni-resources/transfer-your-education-award>

Chapter Four

Member Management

Member Records

For each member entered into an AmeriCorps position there are several records that must be retained by the program. In some instances, these records may be stored electronically, but as many require signatures, a file must be kept for each member. If your program intends to keep any member records in an electronic format the system must meet all requirements of Sections 1703 and 1705 of the Government Paperwork Elimination Act, the Terms and Conditions, and the contract with the Governor's Office of Community Service. For more details on electronic signatures and records management, see the grant Terms and Conditions.

For each member, records must be kept of the member's application, documentation of eligibility, service agreement, time sheets, performance evaluations, entrance and exit forms (depending on subrecipient internal policies), and documentation of all pertinent National Service Criminal History Checks (NSCHC). These items will be discussed further in this chapter.

Some required documentation can or should be stored separately from the member file. Common documentation that may be stored separately is documentation of childcare eligibility, tax forms, and components of the National Service Criminal History Check.

- It is important to note that in alignment with [HIPAA](#), *any member medical documentation received by the program should be stored separately from the member file*. All medical information should be stored in a separate, secure location and only available to the personnel for whom it is necessary.

Supervisors and program directors should conduct periodic internal reviews of member files and timesheets to ensure service descriptions are allowable, hours are being accurately tracked, and member files are current, complete, and compliant.

Member Eligibility (45 C.F.R. 2522.20)

Effective February 27, 2012, AmeriCorps subrecipients are not required to retain documentation to verify identity and citizenship of selected applicants, however the program must document their review. When the individual is invited to enroll in the program, the citizenship status and social security number of potential AmeriCorps members is verified by the Social Security Administration (SSA). Typically, verification is completed within three days and the member's status in the Portal will be indicated as 'verified'.

- In some instances, the member's identity cannot be automatically verified by the SSA and must be manually verified. Manual verification should be initiated upon discovery, so the start date is not delayed. Social Security cards should be signed by the cardholder.

High School Diploma and Self-Certification

To be eligible for AmeriCorps service, an individual must have received a high school diploma or its equivalent, or,

- Did not drop out of secondary school to enroll as an AmeriCorps participant and must agree to obtain a high school diploma or its equivalent prior to using the Education Award; or
- Obtain a waiver from the Corporation based on an independent evaluation secured by the program demonstrating the individual is not capable of obtaining a high school diploma or its equivalent; or
- Be enrolled in an institution of higher education on an ability to benefit basis and be considered eligible for funds under section 484 of the Higher Education Act of 1965 (20 U.S.C. 1091);
For tutoring programs (42 U.S.C 12572)
 - The applicant must have obtained a high school diploma; Unless the tutoring services are through a structured, school managed cross-grade tutoring program

Enrolling in the My AmeriCorps portal requires members to certify their high school status. Such certification fulfills the recipient's verification requirement to obtain and maintain documentation from the member relating to the member's high school education. If the member is incapable of obtaining a high school diploma or its equivalent, as determined by an independent evaluation, the recipient must retain a copy of the supporting evaluation.

For members who did not achieve a high school diploma or equivalent, programs must provide support services to help them get a high school diploma or equivalent. Members must have their high school diploma or equivalent, or obtain a waiver, to access the Education Award. For programs that include the attainment of high school equivalency as a purpose and include GED classes during the program year. Attaining a high school diploma or equivalent may be a requirement of successful completion of the term of service.

Terms of Service

A term of service must be stated in a member service agreement. There are two definitions which must be followed regarding the term of service,

1. Full time term of service is defined as 1,700 hours of service during a period of up to one year
2. Half time term of service is defined as 900 hours of service during a period of up to one year

Upon enrollment eGrants will set a default end date of exactly one year from the start date. There are no specific guidelines on the amount of time which a member must be allowed to complete a less than halftime term, however regulations state a program must "ensure each member has sufficient opportunity to complete the required number of hours for the Education Award". AmeriCorps grant Terms and Conditions further state "[in] planning for the member's term of service, the [sub] recipient must account for holidays and other time off and must provide each member with sufficient opportunity to make up missed hours."

An exception to all Term of Service rules is allowed if a member is serving in an approved National Service Position directly related to disaster response. In this case the member may extend their term of service for up to 90 days. During this extended service period the program is permitted to continue offering that member with a living allowance and other benefits however, the value of the member's Education Award will not change.

Member Start and End dates

Member start, and end dates must fall within the start and end dates of the subaward contract issued by OCS which will typically be within a 12-month period. Members not continue to serve beyond the end date of the contract unless some unforeseen and special circumstance arises where the contract must be extended to allow members to complete service hours. This applies to all members, those receiving a living allowance and those not receiving a living allowance.

Extending a grant beyond the contracted end date is referred to as a "no-cost extension" and must be requested from OCS at least 30 days before the end of the contract. No-cost extensions are reserved for situations where a member(s) needs additional time to complete their term of service. Extending a contract requires OCS approval, may result in adjusting required reporting dates and will likely create additional reporting requirements for the program.

Number of Education Awards

Under no circumstances will an individual be eligible to receive more than the equivalent of two full time Education Awards.

Serving Multiple Terms

The Edward M. Kennedy [Serve America Act Final Rule](#) (published August 20, 2010) increased the limit of terms one may serve in AmeriCorps State and National from two to four terms with added limits stating no individual may receive more than the aggregate value of two full-time Education Awards regardless of the stream of service through which the member earns the Award.

The following guidance is provided by CNCS: Although the *amount* of a fulltime award may change, the *value* of a fulltime award will always be equal to 1.

- For example, an individual who completed a half-time position approved in 2009 received an education award of \$2,362.50. The value of this award is the amount received, \$2,362.50, divided by \$4,725, the amount of a full-time award in the year the position was approved, or .5.
 - Another individual completes a half-time position approved in 2010 and receives an Ed Award of \$2,675. The value of this award is the amount received, \$2,675, divided by \$5,350, the amount of a full-time award in the year the position was approved, or .5.

Using this calculation, the value of an award received for half-time service will always be equal to .5. If an individual exits a term of service for compelling personal circumstances and receives a pro-rated award, the value attributed to that award will be based on the amount actually received.

- For example, an individual was released for compelling personal circumstances from a full-time position approved in 2009 after serving 800 hours and received a pro-rated award of \$2,223.52. The value of this award is the amount of the award received, \$2,223.52, divided by, \$4,725, the amount of a full-time award in the year the position was approved, or .47.
- Another individual was released for compelling personal circumstances from a full-time position approved in 2010 after serving 800 hours and received a pro-rated award of \$2,517.64. The value of this award is the amount of the award received, \$2,517.64, divided by \$5,350, the amount of a full-time award in the year the position was approved, or .47.

Exhaustion of the number of terms one may serve in AmeriCorps State and National would not necessarily prevent an individual from enrolling in a position in another National Service program, such as AmeriCorps NCCC, AmeriCorps VISTA, or Silver Scholars.

| AmeriCorps National Service Network | Maximum Number of Terms within each type of AmeriCorps Program |
|--|--|
| AmeriCorps State & National | 4 |
| AmeriCorps NCCC | no limit on service terms, but members may NOT serve more than two consecutive NCCC terms without a break of at least 10 months before serving again |
| AmeriCorps VISTA | 5 |

For further guidance, read the limitation section or contact OCS Grants Manager, <https://www.nationalservice.gov/programs/ameri-corps/segal-ameri-corps-education-award/amount-eligibility-and>

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 member support and leadership under certain conditions. *Prohibited Activities* apply to AmeriCorps Team Leaders just as they do to all grant covered individuals.

Team Leaders are not permitted to act in a staff capacity or to supervise AmeriCorps members. Team Leaders must not be responsible for program development or coordination. They may assist by providing information and resources on best practices or by helping to develop portions of the program such as training events and curriculum. Under no circumstances should an AmeriCorps member serving as a Team Leader be the individual legally responsible for the program or other AmeriCorps members. A Team Leader position description should predominantly include activities that involve performing direct service and providing support to members engaged in direct service.

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

member recruitment and raising funds or in-kind contributions in direct support of specific AmeriCorps projects, such as service projects. See 45 CFR 2520.40 for detail regarding members and fundraising.

Examples of *allowable* Team Leader activities:

- serving alongside members performing direct service; as a model and to provide assistance;
- training members, providing guidance and support to members, including reflection exercises, conflict resolution, advice for transitioning out of AmeriCorps, etc.
- leading monthly/weekly meetings of members;
- engaging 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 consistent with the AmeriCorps provisions.

Examples of *unallowable* Team Leader activities:

- signing member timesheets;
- accessing another members' file;
- managing the program's payroll and budget
- evaluating member performance;
- disciplining AmeriCorps members;
- grant writing to CNCS
- enrolling/dismissing AmeriCorps members;

National Service Criminal History Checks (NSCHC) - 42 U.S.C. 12645g

With the passage of the Serve America Act of 2009, it is a requirement all grant covered individuals, AmeriCorps members, program staff and all others, funded either by match or federal funds, must submit to requirements that define and comply with National Service Criminal History Checks (NSCHC). NSCHC is not a background check; it is a series of steps that must be taken before a selected candidate may start work or service. *NSCHC should be referred to as such, not as a background check.*

CNCS has issued a requirement all grantees complete the NSCHC eCourse annually. OCS requires two staff from each program pass the course and stay current by submitting certificates of completion to the Training and Technical Assistance Specialist and/or OCS Grants Manager.

- <http://cncstraining.articulate-online.com/ContentRegistration.aspx?DocumentID=62d3d556-45cf-4911-9cd1-aa7682e08aea&Cust=42402&ReturnUrl=/p/4240214797>

CNCS has a high priority on National Service Criminal History Check compliance and sets the expectation NSCHC will be 'On Time, Every Time'. To ensure the timing and elements of the law are followed, program staff should refer to CNCS resources to stay current on compliance requirements.

- <https://www.nationalservice.gov/resources/criminal-history-check>
- <https://www.nationalservice.gov/CHCVideoLibrary>
- Enforcement Guide: <https://www.nationalservice.gov/CHCEnforcement>

Montana State Specific Policies

While all Montana AmeriCorps State & National subrecipients are expected to use CNCS NSCHC resources to stay compliant, there are also state specific policies:

- **CNCS Simple Log effective 9.1.2019:** The Governor's Office of Community Service requires all AmeriCorps State subrecipients implement the CNCS Simple Log to document all NSCHC activities for grant covered individuals. The Simple Log may be requested by CNCS and OCS at any time. <https://www.nationalservice.gov/documents/2017/nschc-simple-log-and-simple-log-instructions>
- **Initiation:** CNCS defines initiation as one step past consent. Grantees must define initiation in their NSCHC policy and document initiation in their NSCHC procedure, in a manner the OIG would respect.
- **NSCHC Accompanier clearance:** Make sure your policy is direct and documents how accompaniers in your program are cleared. If needed, budget for and conduct NSCHC on site supervisors and others in this role.
 - **Effective 1.1.2020:** CNCS requires all NSCHC components be adjudicated prior to ceasing accompaniment.
 - **Accompaniment of members by cleared members:** It is addressed in the 10/5/2012 Final Rule https://www.nationalservice.gov/sites/default/files/resource/fedregister_final_rule_oct_5_2012.pdf See section II.(f) on pages 60924-60925: someone in a covered position who hasn't yet cleared the NSCHC process can be accompanied by "(1) an authorized grantee representative who has previously been cleared for such access".
 - If your program's accompaniment policy specifies cleared members can accompany uncleared members, be sure the policy includes the cleared member may accompany as an "authorized grantee representative".
- **CNCS approved vendors are the only vendors to be used in Montana for NSCHCs.** Fieldprint is the only CNCS approved FBI channeler and Truescreen is the only CNCS approved vendor for conducting the NSOPW and State checks. It is highly recommended subrecipients in Montana use these CNCS approved vendors for NSCHC on all grant covered individuals.
- **Noncompliance Self-Report:** Please conduct internal reviews of member files, particularly NSCHC. If member ineligibility or noncompliance is discovered make a self-report to the OCS Grants Manager and bring into compliance as soon as possible.
- **NSCHC Record retention:** The CNCS approved vendors, Fieldprint and Truescreen, and if applicable, the Montana Department of Justice (MTDOJ) each have different record retention schedules. Note CNCS, OCS, and MTDOJ have unique record retention periods and dissemination methods that must be followed. Contact OCS with questions and always retain all results of the NSCHC as per the subaward agreement.
- **NSCHC Montana Best Practice:** OCS strongly recommends all subrecipients rerun the NSOPW annually for staff and retain each years of search results.

Member Management

eGrants Member Portal

Most technical member and grant management tasks are completed through the eGrants Portal which also serves as the repository for applications coming through the My AmeriCorps website. eGrants questions and error messages should first be directed to the eGrants helpline and secondarily to OCS.

- Member time records are not a function of the AmeriCorps portal. All AmeriCorps State grantees must establish a member time management system outside of the Portal that tracks the hour categories and is used consistently.
- Help Desk: https://questions.nationalservice.gov/app/ask_eg or 800.942.2677.

Site Supervision

It is expected members will be supervised while on duty and the designated site supervisor is available and responsive to the member, the program, and OCS. Programs should provide training and maintain regular communication with all site supervisors. If a site supervisor is grant covered, they must consent to and complete NSCHC.

Member Service Agreements [AmeriCorps Grant Terms & Conditions](#)

The Member Service Agreement is the document that outlines member responsibilities, terms, conditions, and benefits as an AmeriCorps member in a specific program. The minimum required components of a Member Service Agreement are clearly stated in the Terms & Conditions of the specific grant your organization has been awarded.

At a minimum the Member Service Agreement must contain the following:

- Member position description: Each member must have a position description for the service activities including performance criteria. It is the responsibility of the grantee to ensure member positions “do not include or put the AmeriCorps member in a situation where the member is at risk for engaging in any prohibited activity (45 CFR § 2520.65).” Resources on creating a member position description: <https://www.nationalservice.gov/resources/recruitment/encorps/create-position-description>
- Member term of service: Each agreement must state the number of hours the member must serve to complete the term of service and the time span a member must complete the service hours.
- The value of the Ed Award the member will receive for successful completion of service.
- Standards of Conduct: Describe how the member is expected to behave under the specific circumstances of their service; this may include dress code and appropriate use of language.
- Prohibited Activities, 45 CFR 2520: ex. lobbying, political, religious, and advocacy activities and more.
- Non-duplication and Nondisplacement: 45 CFR § 2540.100(e)-(f)
- Fundraising, 45 CFR § 2520.40-.45
- Drug Free Workplace Act of 1988: Subrecipients receiving federal funds must comply with the Drug Free Workplace Act and publish a Drug Free Workplace statement.
- Civil rights requirements, complaint procedures, and rights of beneficiaries
- Suspension and Termination Rules (45 CFR 2522.230) *see more on page 36
 - Release for Cause, Release for Compelling Personal Circumstance, Suspended Service, Reinstatement and Release prior to serving 15% of the term

- Grievance Procedures (45 CFR 2540.230) Including Grievance procedures in the Member Service Agreement ensures the member receives the procedure and signs acknowledging the receipt and review of the document.
- Other requirements by Grantee: In the Member Service Agreement, grantees may include additional requirements necessary for the member to complete their term of service and receive the Education Award. Examples of additional requirements of members may be mandatory attendance at service events and trainings, or a minimum number of volunteers recruited.

Member Position Descriptions

Each grantee of OCS/CNCS must accurately and completely describe the activities to be performed by each member in a position description. Position descriptions support successful member recruitment and ensure compliance with AmeriCorps Prohibited Activities. Position descriptions should provide meaningful service activities and appropriate performance criteria.

The recipient is responsible for ensuring the positions do not include or put the AmeriCorps member in a situation where they may be at risk for engaging in any prohibited activity, or being perceived as engaging in any prohibited activity 45 CFR § 2520.65, an activity that would violate the non-duplication and non-displacement requirements 45 CFR § 2540.100, or exceed limitations on allowable fundraising 45 CFR §2520.40-.45.

- ✓ The recipient must accurately and completely describe the activities to be performed by each member in a position description.
- ✓ Position descriptions must be provided to CNCS and OCS immediately upon request.
- ✓ The recipient must ensure each member has sufficient opportunity to complete the required number of hours to qualify for an Education Award.
- ✓ In planning for the member’s term of service, the recipient must account for holidays and other time off and must provide each member with sufficient opportunity to make up missed hours.

CNCS sets the standard and resources on member position descriptions and can request them anytime.

- ✓ <https://www.nationalservice.gov/resources/recruitment/encorps/create-position-description>

Certain words, even if accurate in describing a member’s service, may construe an unallowable activity and should be avoided in position descriptions and service listings.

- For example, the word advocate is defined as *one that defends or maintains a cause or proposal*. However, in National Service the word is interpreted to mean: *to conduct activities aimed at influencing public officials*. The definition of the actual word may be an allowable AmeriCorps activity however the interpretation of the word is unallowable.
- Similarly, the description of ‘other duties as assigned’ should also be avoided.

Teleservice should be rare, and requires appropriate documentation, supervision and oversight.

Teleservice is an arrangement in that the member performs service duties and responsibilities from an alternative service site other than the location where the individual would typically serve. Teleservice does not refer to service performed while on authorized travel status, or mobile service at designated sites as opposed to the active service location.

- <https://www.nationalservice.gov/documents/2020/americorps-state-national-teleservice-guidance>

CNCS expects that teleservice be as infrequent as possible. Since the COVID19 pandemic, OCS will require each program have a concise written policy regarding teleservice that addresses the following:

- when teleservice is reasonable,
- that written authorization from OCS in advance is needed,
- expectations of communication of site supervisors and teleservice members,
- how the risk of time and attendance abuse will be mitigated
- how appropriate supervision including validation of the activities to be performed, and verification of hours claimed.

Written requests should be submitted to the Grants Manager 14-30 days in advance. OCS will respond in writing to indicate approval, disapproval, and conditions as applicable.

OCS monitoring and oversight may include inquiry into identified cases of teleservice to ensure that it was conducted appropriately and according to program, OCS, and CNCS policies.

Guidelines for Fundraising by Members, 45 CFR 2520.44

AmeriCorps members may not assist organizations with major fundraising efforts or in writing grant applications to the Corporation. Member hours earned fundraising must be tracked on the time logs in a separate category and may not exceed 10% of the originally agreed-upon term of service, as reflected in the member enrollment in the National Service Trust (45 CFR 2520.45). *However, CNCS policy permits limited activities related to fundraising by AmeriCorps members, when the activities contribute to the direct service of the program. For example, members may:*

- Seek donations of books from companies and individuals for a program in which volunteers teach children to read
- Write a grant proposal to a foundation to secure resources to train community volunteers
- Secure supplies and equipment from the community to enable volunteers to help build houses for low-income individuals
- Secure financial resources from the community to assist in launching or expanding a program that provides social services to the community and is delivered, in whole or in part, through the members of a community-based organization
- Seek donations from program alumni for specific service projects performed by current members

Members may not:

- Raise funds for living allowances or for an organization's general operating expenses or endowment (as opposed to project)
- Write a grant application to the Corporation or to any other Federal agency

Evaluating Member Performance (45 CFR 2522.220)

The grantee must conduct and keep a record of at least a midterm and an end-of-term written evaluation of each member's performance for Full-Time members, and an end-of-term written evaluation for less than Half-Time members. The end-of-term evaluation should address, at a minimum, the following factors:

- The number of hours the member has completed and whether this satisfies the term of service;
- Whether the participant has satisfactorily completed assignments, tasks, or projects, making them eligible for the Ed Award; and
- Whether the participant has met other performance criteria that were clearly communicated both orally and in writing at the beginning of the term of service.

Under AmeriCorps regulations end of term evaluations are the key piece in determining a member's eligibility for additional terms of service. For this reason, all members, regardless of the status of their exit, must receive an end of term evaluation.

- Applicants must disclose previous terms of service when applying for an AmeriCorps position, so the program can contact the applicants former service program staff to request a reference and information on previous member evaluations.

Member Safety

Under grant provisions, subrecipients must have appropriate risk management to ensure the safety of AmeriCorps participants and community volunteers. Members may not participate in projects or undertake service activities that pose a significant safety risk. Subrecipients should establish appropriate policies related to the supervision of members and provide specific training to minimize risks. While AmeriCorps members are not considered employees, they are eligible for worker's compensation. Workers compensation is an allowable grant expense. Refer to the Terms and Conditions for your appropriate grant and the MT Dept of Labor & Industry, <http://erd.dli.mt.gov/work-comp-regulations>

Voting

Subrecipients should encourage all eligible members to vote and when appropriate allow members time during to vote during scheduled service hours.

Member Release from Participation, 45CFR§2522.230

A program may release members from participation for two reasons: (a) for compelling personal circumstances; and (b) for cause. See 45CFR§2522.230 for requirements and 2CFR§200.333 for record retention requirements.

In addition to the regulations, the following applies: *No Automatic Disqualification if Released for Cause:*

- A release for cause covers all circumstances in which a member does not successfully complete the term of service for reasons other than compelling personal circumstances. Therefore, it is possible for a member to receive a satisfactory performance review and be released for cause.
 - For example, a member who is released for cause from a first term—e.g. the individual has decided to take a job offer but who otherwise performed well, would not be disqualified from enrolling for a subsequent term if the individual received a satisfactory performance evaluation for the first period of service.
 - In the exit form, there is a yes or no required response as to if the member satisfactorily completed the requirements of service. If ‘no’ is indicated, the member will be disqualified for future terms of service.

Member Release for Compelling Personal Circumstance

This circumstance allows a member to end the term of service early and receive a prorated Education Award. There are two qualifications: (1) the member must have completed at least 15% of the term and (2) they must demonstrate a compelling personal circumstance.

- It is the duty of the member to demonstrate the compelling personal circumstance and the AmeriCorps program to determine if the member’s reason for leaving is legitimately a compelling personal circumstance. For additional guidance on whether a release for compelling personal circumstance is warranted the program should contact OCS Grants Manager.
- Members exited without an Education Award, and those exited with partial Education Awards are typically selected for review during OCS/CNCS compliance monitoring.

Compelling personal circumstances are beyond the participant's control, such as, but not limited to:

- A participant's disability or serious illness;
- Disability, serious illness, or death of a participant's family member if this makes completing a term unreasonably difficult or impossible; or
- Conditions attributable to the program or otherwise unforeseeable and beyond the participant's control, such as a natural disaster, a strike, relocation of a spouse, or the nonrenewal or premature closing of a project or program, that make completing a term unreasonably difficult or impossible.

Other circumstances the Corporation, has for public policy reasons, determined as such, including:

- Military service obligations
- Acceptance by a participant of an opportunity to make the transition from welfare to work
- Acceptance of an employment opportunity by a participant serving in a program that includes employment among its participants in its approved objectives.

Compelling personal circumstances do not include leaving a program:

- To enroll in school;
- To obtain employment, other than in moving from welfare to work or in leaving a program that includes in its approved objectives the promotion of employment among its participants; or
- Because of dissatisfaction with the program.

45CFR2522.230 (a)(6) As an alternative to releasing a participant, after determining that compelling personal circumstances exist, the program may suspend the participant's term of service for up to a year (or longer if approved by the CNCS based on extenuating circumstances) to allow the participant to complete service with the same or a similar AmeriCorps program at a later time. Approvals are awarded on a case-by-case basis.

It is best practice for a program to receive or maintain documentation of a compelling personal circumstance (e.g. a statement from the member, doctor's note, etc.) but, it is necessary to document that the member was released for compelling personal circumstance (staff memo to file).

Member Release for Cause, 45 CFR 2522.230

A release for cause includes any circumstances other than compelling personal circumstances that warrant an individual's release. These circumstances may include anything from disciplinary removals pursuant to the program's service agreement with the member, to the member's exit prior to completing service hours.

In alignment with the Drug-free Workplace Act of 1988, AmeriCorps subrecipients must release for cause any participant who is convicted of a felony, the sale, or distribution of a controlled substance *during* a term of service. In either of these instances the program must notify the Governor's Office of Community Service within in 10 days of the infraction, prior to the member's release.

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 AmeriCorps. Failure to do so disqualifies the individual for another Ed Award.

Regardless of the situation under which a member is released it is required they be exited in the eGrants system within 30 days and if they are receiving childcare benefits, the provider be notified immediately.

Replacing a Member - Slot Refill

Except for recipients whose grant awards have special award conditions under 2 CFR §§ 200.207 or 200.338, AmeriCorps State subrecipients that have fully enrolled the awarded member positions are *allowed to replace any member who terminates service before completing 30 percent of the term provided that the member who is terminated is not eligible for and does not receive a pro-rated Education Award. This is known as a 'slot refill'.*

- A slot being refilled does not necessarily need to be replaced with the same slot type. If the program is 100% enrolled there is the option to convert the refill slot. The resulting Education Award from the refill must be equivalent to what was originally awarded.

Changes in Member Service Year Member positions - Slot Conversions

As of November 13, 2006, subrecipients are allowed to convert one full-time position to up to three quarter-time positions. CNCS allows State Commissions to approve slot conversions from the approved budget to a configuration that maximizes utilization of the awarded MSY, under certain circumstances. This policy allows unfilled AmeriCorps slots to be converted in accordance with the grant award, therein increasing the number of slots in the program, within the awarded MSY. When converting a slot to one requiring fewer hours, the grantee is not limited to a one-for-one slot conversion and may increase the number of members accordingly. *However, the total number of MSYs and Education Award amounts in the grant may not increase because of the slot conversion.*

All conversion requests must be Trust neutral, (within the total Education Award amounts awarded to the grant), subject to availability of funds in the Trust and awarded MSY. Slot conversions may not leave .21 or greater MSY unused. Remaining MSY as a result of slot conversion may not be available later in the program year.

- Information on converting a filled slot:
https://www.nationalservice.gov/sites/default/files/documents/FAQs_4_10_14.pdf

The OCS slot conversion request procedure is as follows:

- Program staff complete the slot conversion request template available on the AmeriCorps, For Program Director's page and submit the completed request to the OCS Grants Manager, preferably a week prior to the needed change.
- Grants Manager will review and approve and may request more information, such as a budget modification or assurance.
- If not approved, no change.
- If approved, the Grants Manager will communicate approval for the program staff to proceed in the program's slot table by making the changes, validating then saving in eGrants.
- If another slot conversion is requested, the program should use the most recent slot configuration to propose the next change, not the original slot configuration.
- Follow the process. Unauthorized changes in eGrants may result in compliance findings or unintended loss of MSY.

Remember The total MSY & Education Award amounts *may not increase* from the slot conversion.

Member Exit

To officially end service, a member has successfully completed the term of service or not, members should complete the exit process in My AmeriCorps Portal.

- In the case a member does not exit themselves and cannot be reached, the program should complete a National Trust Exit form, indicate the individual was not available to sign the form and add the documentation into the member file.

- The final step is for the program to exit the member from eGrants within 30 days of the member's final hour served. Failure to comply with 30-day rule may negatively impact program performance and future funding recommendations.

Site Visits

AmeriCorps subrecipients are expected to visit active service locations annually or more often depending on design or to address unforeseen circumstances. Program budgets should facilitate staff travel to accomplish the site visits to service locations.

- AmeriCorps program staff should document the visit and use a written method to conduct the visits, for example a site visit questionnaire. Site visit tools should include questions designed to prevent, detect, and if needed, enforce instances of noncompliance.
- Many programs include a meeting with the member and the site supervisor during the visit. Some meet with them separately and then together.

AmeriCorps subrecipients should expect onsite and/or remote compliance monitoring and oversight visits from the Office of Community Service, and likely CNCS. Grant monitoring is based on annual risk assessment determination and is not an audit. Site visits allow OCS/CNCS staff to learn more about service and training activities, community partnerships, compliance with Corporation regulations, policies and grant provisions, progress of meeting performance measures, highlight best practices, and to provide technical assistance. All visits will be coordinated with organization leadership and program staff.

- OCS Risk Assessment and monitoring tools <http://serve.mt.gov/AmeriCorps/program-directors>

Chapter Five

Fiscal Management

The Notice of Grant Award and the Terms & Conditions contain many specific details for governing and managing the grant. The organization's financial officer and accountant should be familiar with the detailed financial and management requirements contained in Corporation regulations, grant provisions, and the applicable Office of Management and Budget (OMB) Circular, 2CFR200.

Setting up Financial Systems

The Basics of a Responsible Financial Management System

It is expected organizations operating an AmeriCorps grant have instituted tools necessary to ensure all federal funds and match are properly allocated, documented, and accounted. Legal applicants must have policies and procedures related to financial management. Organizations should use Generally Accepted Accounting Principles (GAAP) with general ledgers and similar books of record, supported by source documentation that establishes a clear audit trail. Financial reports must clearly lead to ledgers and source documentation.

Individual time distribution records (time sheets) must be kept for all grant covered individuals, regardless of their status as exempt or non-exempt. Records must identify the individual source of funds to which time is being charged. This is especially important for staff who are partially funded under the grant and whose other duties would be unallowable under AmeriCorps funding, such as lobbying or fundraising activities.

As a best practice, grantees should segregate office financial duties to the best extent possible. This could include but is not limited to having one person sign the checks and another reconcile the bank statement, and ensuring employees are not allowed to sign their own paychecks. The checklist below will help your organization organize and fulfill the fiscal compliance expectations.

Checklist for Financial Systems

- ✓ Unique Accounts AmeriCorps resources must be separate accounts in the organization ledger or have a separate account numbers. All federal grant awards must be tracked separately, including CNCS. The federal share and the match must also be tracked separately.
- ✓ eGrants to access eGrants, an organization's authorized representatives must create an account. This will automatically generate an e-mail for the eGrants administrator within the organization. When the administrator receives the e-mail, they may approve or deny the employees access and assign them appropriate access levels.
- ✓ Tracking In-Kind Match - The program is responsible for tracking in-kind services from partners and from their own agency. This includes donated items and staff time. It is recommended that the program implement an in-kind donation tracking sheet to document each individual donation

that will be counted as match. This document should allow for the donor to estimate the value of the donated good or service as well as a place for listing the actual amount claimed as match.

- ✓ Tracking Cash Match - A system must be developed to track the organization's cash match. OCS and CNCS expect each program to meet their budgeted match. If the budgeted match cannot be met, contact the Financial Manager. Cash match is held to the same allowability and documentation as federal funds.
- ✓ Disbursement of Member Living Allowance - Members must receive the living allowance in equal installments over the term of service. The stipend is not dependent on the number of hours served in any service period.
 - For members completing hours prior the completion of the term of service, they may be exited with an award, but may only receive a stipend for the period during which they were actively serving.
 - If a member serves no hours during a period they will still receive a living allowance. Time sheets are required to be current within 30 days. It is recommended that if a member goes 30 days without completing service hours, that the member be suspended or released.

Program Income 2CFR200.307

Program income defined in 2CFR 200.307 and 45CFR 2541.250, will typically be added to the budget to meet the grantee share stated in the approved grant application and budget. ServeMontana grantees are encouraged spend program income at the time it is earned to ensure there is not excess program income at the end of the grant period.

Unexpended program income will be deducted from the CNCS share as stated in the approved grant application and subaward agreement. Programs are required to report excess program income on the PER and FFR to the Commission. Excess program income not expended or received after the end of the grant period shall be returned to the commission.

Cost Matching Requirements for AmeriCorps Subrecipients, line item budget:

Each subrecipient is responsible for meeting matching amounts in the grant award as per the approved budget. Based in your organization's proposal, the budgeted match amount will likely exceed the required minimum match. *Refer to NOFO and CFR match schedule.*

Valid documentation of cash and in-kind match includes:

- Donations, letters/statements of costs that show the type of contribution, value, and frequency
- Time and effort forms or others that show contribution of time to program by staff
- In kind receipt/voucher forms, such as professional services, meetings held in donated space, public service announcements, and recognition events. Contact OCS Financial Manager with questions
- <https://nationalservice.gov/resources/financial-management/general-financial-and-grants-management-overview>

As a general rule, it is unallowable to use federal funds as match for a CNCS grant. However, the exception is if, "independent authority for a grantee to use other federal funds in connection with a National Service program" is documented by the other federal source, then other source of federal

funds may be used as match. If your organization seeks independent authority, check in with OCS Financial staff to determine proper documentation.

OMB Circulars

The OMB circulars cited in the Notice of Grant Award and Terms & Conditions address many details and specifics governing the management of a federal grant, including allowable expenses. It is important to note that the Circulars alone do not cover all allowable grant expenses. For example, volunteer time generated by an organization may be counted as match under some federal grants but follows stricter guidelines under AmeriCorps regulation. Be sure to stay current on the grant's Terms & Conditions AND Pay attention to 2CFR200. Contact OCS with questions.

Tips to Avoid Disallowance

The financial management of a program is monitored in three ways: monthly Periodic Expense Reports, quarterly Federal Financial Reports, and through fiscal compliance monitoring. If an organization does not comply with the grant provisions and OMB requirements, costs that have been charged to the grant can be questioned and disallowed. If a program's financial management system is seriously inadequate, OCS or the Corporation may opt to withhold reimbursement payments, implement a manual hold, suspend funds for a duration, terminate the grant, recover funds, or take other legal action.

Avoid common problems by ensuring:

- accounting practices are adequate
- internal controls are strong yet practical
- policies and procedures for documentation and record-keeping exist and are being followed
- financial status reports are accurate
- all matching contributions, particularly in-kind are documented correctly

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 documented adequately

Pre-award Cost Requests

Requests to spend federal or match prior to the budget period start date require advance, written approval by OCS. To request advance approval for preaward costs, read the grant Terms & Conditions, then submit a concise description of the cost, share of cost, and the amount on letterhead with a brief description of why the request is needed. Some preaward approvals may require CNCS approval. OCS will respond in writing to approve, decline, or clarify the request. Be sure to include concise rationale and that the letter is signed by an Authorized Representative.

Taxes

Most subrecipients 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.

- In Montana, AmeriCorps members are not eligible for unemployment insurance.

Income Taxes

Under federal tax laws, 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.

- Income eligible 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 receiving a living allowance must complete a W4 form at the start of the term of service. At the end of each applicable tax year, subrecipients must provide each member a W2 form.

Fundraising Rules for Program Staff

In general, AmeriCorps staff and members may not lead the organization's major fundraising efforts. Corporation policy permits limited activities related to fundraising by grant covered staff, 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 more than 10% of any individual member's time.

Under OMB Circulars it is not allowable to charge the grant for costs for "organized fundraising" or expenses incurred "solely to raise capital or obtain contributions" (*however it is allowable to apply an appropriate amount of indirect funds to these activities*).

Examples of what grant covered staff may do with federal grant funds:

- Develop and print materials such as brochures and annual reports to be used for educating the public, which includes potential board members, funders, community partners, and elected officials.
- Contact individuals and organizations (potential partners) who may assist in delivering services.
- Ask the board of directors and other volunteers to raise funds on their own time.
- Pay for a program evaluation to demonstrate the program's impact and effectiveness.
- Solicit community involvement with or in-kind support for the 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 and other direct service activities that may have a fundraising element.

- Include members of the public (*including funders and other community partners*) on a general mailing list for newsletters or brochures and other general interest publications. (*Publications paid with AmeriCorps grant funds, federal or matching funds, should not solicit donations*).
- Include in the general-purpose newsletter a “wish list” of needed in-kind items.
- Invite members of the public, including funders, to make a site visit to the program.
- Seek 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, funders and other community partners, to attend orientation, end of service 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 the AmeriCorps grant.
- Charge time spent by staff on fundraising to AmeriCorps or matching funds.

Financial Reporting

Typically, a monthly Periodic Expense Report (PER) is due to the OCS Financial Manager. The completed PER serves the expense report and request for reimbursement. Due dates are listed in the directions and are communicated by OCS staff. These reports are emailed to the organization’s designated fiscal staff. Line item grant PER contains the full budget in eGrants categories and fixed amount grants report on member service hours.

Quarterly, line item grant recipients must complete and submit a Federal Financial Report (FFR). The PER and FFR provide OCS information on program spending for desktop monitoring and serves as the request for CNCS funds. A Federal Financial Report (FFR) must be submitted to the Commission each quarter by the 20th day of the month following the reporting period. If the due date falls on a weekend or holiday the report will be due on the next business day. FFR reporting forms are included in the monthly reporting workbook, also known as the Periodic Expense Report (PER).

On a semi-annual basis subrecipients are required to report any other sources of federal funds being used as match on the AmeriCorps grant.

At the end of the annual budget period, fixed award grantees must reconcile member service hours, partial terms and refilled positions.

Grant Modifications

Changes in the Grant Not Involving the Budget

Examples of program changes that require prior written approval of OCS and/or CNCS:

- changes in the scope or goals of the program;
- changes in member position types and service locations;
- changes in the start and end dates of a grant;
- decisions to sub-grant AmeriCorps activities not previously approved;
- slot conversions, see section on slot conversions for information and process guidance.

Changes in the Grant Involving the Budget

Changes to the grant budget should be requested through the budget modification form found in the Periodic Expense Report (PER) supplied to the program. Examples of program changes that require prior written approval of OCS and/or CNCS:

- Changes to the budget near, at, or above value of 10% of the full award.
- Purchases of equipment over \$5,000 unless specified in the grant award budget.
- Transferring funds from Member Support costs to Program Operating costs.

Retention of Grant Records - 45CFR§2541.420

In general, all grant related records must be retained and safeguarded for the period of time described in the contract with OCS. If an audit is started prior to the expiration of the retention period, the records must be retained until the audit findings are resolved and the activity is officially closed. Read the contract with OCS to verify the record retention schedule; some contracts require up to 8 years!

Formula and State Competitive Award Member Position Transfers

State commissions may not transfer member positions between competitive and formula subrecipients, or vice-versa. State commissions may not transfer funds among competitive subrecipients.

- 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. It is required a member provide a compelling personal circumstance to justify the transfer.
- As a general rule, members may not transfer across different streams of service (e.g. from AmeriCorps State or National to AmeriCorps VISTA).

Audit Requirements

As per 2CFR 200.501, recipients of federal grant awards who spend \$750,000 or more in total federal awards are required to have audits performed in accordance with the organization type.

<https://www.gpo.gov/fdsys/granule/CFR-2014-title2-vol1/CFR-2014-title2-vol1-sec200-501>

- If the legal applicant is subject to an audit, the report should be current on file with OCS.

Closeout Process

Grant Closeout is outlined in the AmeriCorps Terms & Conditions. All activity must conclude, and all members exited. All close-out documents are due to OCS 45 days following the end of the grant period by 5:00 pm MST. Closeout forms are online <http://serve.mt.gov/AmeriCorps/program-directors>

The Role of CNCS Office of the Inspector General (OIG)

The Corporation's OIG is an independent 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 Congress informed about problems and deficiencies relating to the Corporation's programs and operations nationwide. The OIG carries out this role by conducting and supervising audits and investigations that prevent and detect fraud, waste, and abuse.

The OIG is authorized by statute to have full access to all records, reports, and other available material in conducting its work. The OIG coordinates the Corporation's relationships on matters of fraud, waste, and mismanagement with other organizations, including federal, state, and local law enforcement agencies. For examples and cautionary tales: <https://www.cncsoig.gov/>

When to contact the Office of the Inspector General

There are two types of inquiries to the CNCS OIG: general inquiries and hotline reports.

General Inquiries CNCS OIG accepts confidential referrals, <https://www.cncsoig.gov/contact/general-inquiry>

General inquiries may be submitted via the following methods:

- Telephone: 202.606.9390
- Fax: 202.485.0008
- Office of Inspector General
Corporation for National and Community Service
250 E St. S.W. Suite 4100
Washington, DC 20525*

* Communication sent via the U.S. Postal Service will be delayed due to security screening measures. CNCS OIG suggests that you use email, facsimile, or private carrier.

The OIG operates a Fraud Hotline for concerned citizens, program participants, employees of Corporation for National and Community Service grant recipients, Volunteers, and others to report instances of fraud, waste, abuse of authority, and mismanagement.

Hotline reports should be made via the following methods:

- OIG Hotline telephone number: 800.452.8210
- Reports may be made via email to: hotline@cncsoig.gov
- Or with the form on the OIG website: <https://www.cncsoig.gov/hotline>

Subrecipients should contact the Office of the Inspector General whenever the organization discovers information indicating there may be waste, fraud, abuse, or any violation of criminal law at the program or service site. *Note: Montana Commission subrecipients may choose to contact OCS before, during, or after you make a report to the OIG. Please be encouraged to inform OCS so we are aware and can assist in navigating the situation.*

Chapter Six

Training and Technical Assistance

The Governor's Office of Community Service (OCS), also known as ServeMontana, is committed to providing quality assistance with the philosophy: "The success of Montana's AmeriCorps programs is our responsibility."

OCS coordinates training, sponsors events, and provides information about local, regional, and national training opportunities for staff and members. We encourage program staff to partner and create a collaborative environment where best practices and challenges are commonly shared. Program staff are provided resources to attend training events designed to strengthen development as an AmeriCorps expert.

AmeriCorps staff members complete a Professional Development Plan to identify specific professional development needs and strategies to achieve their strategic goals.

Needs Assessment

OCS utilizes a needs assessment as a strategy to gather input for the State Service Plan and to assess training and technical assistance needs of MT AmeriCorps. The result is a dynamic, multifaceted approach for developing excellence, collaboratively and individually, to address identified needs. OCS is committed to working with organizations, providing training and technical assistance, and helping programs success as national service grantees.

Technical Assistance

- **AmeriCorps Program Directors Guide** – subgrantees are encouraged to become familiar with the CNCS Terms and Conditions, regulations, and guidance related to administration of AmeriCorps grants. These governing documents are referenced throughout this guide.
- **OCS Email Distribution List** – OCS staff strive to update subrecipients by email regarding: policy and program developments, important upcoming dates, CNCS requests for input, upcoming training opportunities, (could be bulleted list) It is critical for program directors to review and share this information with program staff, members, and other relevant personnel and keep OCS updated about changes of contact information.
- **ServeMontana Newsletter** – The newsletter contains important information about national service and community volunteerism, upcoming trainings, National Days of Service, special events and more.

Training for AmeriCorps Program Staff (in state)

- **Program Director Bi-Monthly Conference Calls** – OCS hosts Program Director conference calls bimonthly. Topics vary and attendance is required; if a program staff is unable to attend, they must submit a program update prior to the conference call. Calls are scheduled on the second Thursday of every other month and typically begin at 2p.m.
- **Annual Convening** - Each August, in place of the bimonthly conference call, OCS staff bring program staff together for updates, professional development, and networking at the Program Directors Annual Convening. Each Program Director is expected to attend the annual event and notify OCS's Grants Manager if there is a substitution.
- **ServeMontana Symposium** - This annual gathering is OCS's signature event! The ServeMontana Symposium brings all streams of AmeriCorps in Montana together to serve, learn, grow, reflect, and promote civic engagement. Each program is required to plan and to attend this multiday event. <http://serve.mt.gov/ServeMT/servemontana-symposium>
- **State of Montana, Professional Development Center** - The State Professional Development Center delivers high-quality training through research-based curricula, class participation, and instructor knowledge. www.pdc.mt.gov
- **Community Building Institute (CBI)** - CBI is based on a community-building framework, or "6 steps," used as a model for sustainable community development. This web-based training includes six, one-hour sessions facilitated by community leaders. Participants interact with trainers and receive resources, support materials and a certificate upon completion. <https://mtcompact.org/training-resources-2/community-building-institute/>

Training for AmeriCorps Program Staff (out of state)

Please contact OCS to see if there are resources available to support cost of attendance.

- AmeriCorps Startup Program & Fiscal Boot Camps (fall)
- National Service Regional Training, Pacific/Southwest region (spring)
<https://www.nationalservicetraining.org/>
- Leadership Forum for National Service Executives, weeklong in Seattle, WA
<http://servewashington.wa.gov/programs/ameriCorps/subgrantee-resources/leadership-forum-national-service-executives>
- Points of Light Foundation's Conference on Volunteering and Service – this annual event provides tools, insights, and connections to ensure the social sector continues to grow and innovate in a rapidly changing world. <http://www.volunteeringandservice.org/?webSyncID=9631b809-b79b-7721-31dc-45e8b520bc8b&sessionGUID=707560d4-023e-b36a-19a4-3c4da6ac5ede>

OCS Sponsored Travel for Program Staff Training – reimbursement process

When OCS reimburses an organization for program staff to travel and/or attend training, the legal applicant's organization should use *non-grant resources* to initially cover the costs. Because the event is not budgeted in the CNCS program grant and *is budgeted in OCS CNCS grant*, training funds should not come from the AmeriCorps grant budget.

- The process to submit a request for reimbursement is as follows:
 - Traveler submits completed travel documentation to their organization's fiscal staff for reimbursement.
 - The authorized organization staff submits a signed invoice to OCS, with the complete travel documentation included for review and reimbursement. Reimbursements are made to organizations, not individual staff.
- OCS sponsored travel is reimbursed *only* at state rates for mileage, lodging, and per diem.

OCS reserves the right to request reimbursement from subrecipients for any costs resulting from late registration, non-attendance by registered participants, or other actions by persons associated with the program staff or members. All costs relative to such requests must be paid from non-federal sources.

New and Existing AmeriCorps Staff Training Requirements Checklist:

- Bi-monthly calls/In person August Convening
- Staff Check-Ins; monthly for the first-year staff
- NSCHC annual eCourse completion
- eCFR/ 2CFR 200
- Professional Development Needs Assessment and resulting Professional Development Plan

Professional Development Framework for AmeriCorps Staff

The Program Development Framework was developed by OCS and program staff with guidance by Verve Exchange in August 2019. The Framework incorporates an individual needs assessment with professional development goals. Each Montana AmeriCorps staff will complete a professional development needs assessment at least once per three-year grant cycle.

The framework will be shared with OCS staff to review goals, necessary resources, and action plan. Goals and objectives may take more than one year to achieve and require OCS and/or subrecipient resources for staff training and/or travel. individualized

- The Professional Development Framework is located on the "Program Directors" page of the ServeMontana website, www.serve.mt.gov.

Training Evaluation

Training and technical assistance activities are conducted by OCS and evaluated by participants. Participant feedback is used when planning future training activities.

Chapter Seven

Additional Resources

America's Service Commissions (ASC): <http://www.statecommissions.org/>

- ASC offers program memberships - <https://www.statecommissions.org/state-service-partner>

AmeriCorps Terms & Conditions: <https://www.nationalservice.gov/resources/financial-management/terms-conditions-and-certifications-assurances-cnccs-grants>

AmeriCorps Alumni: www.americorpsalums.org

The Knowledge Network is a technical assistance website: <https://www.nationalservice.gov/resources>

CNCS Managing AmeriCorps Grants:

<https://www.nationalservice.gov/build-your-capacity/grants/managing-ameri-corps-grants>

CNCS megasearch

https://www.nationalservice.gov/sites/default/files/upload/ASN_Megasearch_Document_7-25-16.pdf

CNCS National Service Criminal History Checks (NSCHC):

<https://www.nationalservice.gov/resources/criminal-history-check>

CNCS Office of Inspector General: <https://www.cncsoig.gov/>

Education Award information:

- <https://www.nationalservice.gov/programs/ameri-corps/alumni/segal-ameri-corps-education-award>
- <https://mtcompact.org/awards-scholarships/segal-ameri-corps-education-award-and-match/>

Governor's Office of Indian Affairs: <https://tribalnations.mt.gov/>

CNCS Litmos, online learning: <https://www.nationalservice.gov/resources/litmos-training-resources>
(Litmos is where to access and complete the NSCHC eCourse - send certificate of completion to OCS)

Peace Corps: <https://www.peacecorps.gov/>

PsychArmor® Institute provides resources to Americans so they can effectively engage with and better support military service members, Veterans and their families: <https://psycharmor.org/>

7 Cups connects you to caring listeners for free emotional support: <https://www.7cups.com/>

Recruitment: <https://www.nationalservice.gov/resources/recruitment/volunteering-america-resources>

ServeMontana, for Program Directors: <http://serve.mt.gov/AmeriCorps/program-directors>

Key Distinctions, Definitions, and Acronyms

America's Service Commissions (ASC) - ASC is a nonpartisan, nonprofit organization representing and promoting state service commissions across the US and territories. ASC is a peer network of governor-appointed commissioners, along with staff from the state service commissions. ASC also offers program membership & benefits, learn more at: <http://www.statecommissions.org/state-service-partner>

AmeriCorps – An umbrella term that refers to programs designated by the Corporation as national service programs and the participants serving in them. AmeriCorps includes AmeriCorps State & National, AmeriCorps VISTA (Volunteers In Service To America), and AmeriCorps NCCC (National Civilian Community Corps).

AmeriCorps Member – An individual selected to serve and enrolled into an approved service position should be referred to as an AmeriCorps member, or members, or National Service Participants, not *volunteers, workers, staff, participants, or employees*. The word *member(s)* is lowercase.

AmeriCorps National Service Network – Refers to all the subrecipients affiliated with AmeriCorps—including AmeriCorps NCCC, AmeriCorps VISTA, AmeriCorps State and National, AmeriCorps Tribes and Territories, the AmeriCorps Education Awards Program (EAP).

AmeriCorps NCCC (National Civilian Community Corps) – A residential AmeriCorps program in which 18-24 year-old-members are housed and trained together on military bases and deployed in teams to service sites throughout the surrounding region. <http://www.nationalservice.gov/programs/ameri-corps/ameri-corps-nccc>

AmeriCorps State & National – Used when referring to grants or funding, AmeriCorps State grants are distributed through state service commissions; AmeriCorps National Direct grants are distributed to organizations directly from the Corporation for National and Community Service.

AmeriCorps VISTA (Volunteers In Service To America) – Full-time, National Service program for citizens ages 18 and older interested in developing sustainable solutions to poverty in communities across America. AmeriCorps VISTA members serve with nonprofit, faith-based, and community organizations and agencies to increase capacity, develop infrastructure that expands services, strengthens programs, and empowers low income individuals. AmeriCorps VISTA is under the AmeriCorps umbrella and is administered by the Corporation.

Audit – An official inspection of an individual's or organization's accounts, typically by an independent body. An audit is not the same as compliance monitoring.

Campus Compact – A national organization of college and university presidents with numerous state affiliates committed to advancing service on their campuses. <http://compact.org/>

Citizen – A legally recognized subject or national of a state or commonwealth, either native or naturalized. A person who owes allegiance to and is entitled to the enjoyment of full rights in the United States.

Code of Federal Regulations (CFR) – 45 CFR 2520 govern AmeriCorps use the link to search & locate important information. https://www.ecfr.gov/cgi-bin/text-idx?tpl=/ecfrbrowse/Title45/45cfr2522_main_02.tpl

Community Based Organization (CBO) – Any private non-profit organization (including faith-based organizations) that is representative of a community or a significant segment of a community and is engaged in meeting, human, environmental, or public safety needs.

Commission Investment Funds (CIF) – Funds provided to state commissions to facilitate increased Commission capacity and the ability to provide training and technical assistance to subrecipients. Funds vary from year to year as per Congressional appropriations.

Consortia – A group of organizations whose purpose is to collectively facilitate and support the work of a service program in ways that add material and human resources beyond those available to each organization individually.

Compliance Monitoring – A formal process that reviews all funded programmatic and financial grant components against federal and state requirements, organizational operations, governance, grant policies and procedures.

Corporation for National and Community Service (CNCS) – The independent federal agency that encompasses the work and staff of two previously existing agencies, the Commission on National and Community Service and ACTION. The Corporation was created by the National and Community Service Trust Act of 1993.

Domestic Volunteer Service Act of 1973 – The Domestic Volunteer Service Act authorized VISTA, the Foster Grandparent Program, the Senior Companion Program, and the RSVP program. The legislation was amended in the early 1990's with the National and Community Service Trust Act which created the Corporation for National and Community Service, AmeriCorps and State Service Commissions.

Education Award – A post-service benefit earned by all AmeriCorps successfully completing a Term of Service. The Ed Award is a voucher the Alum can apply directly toward cost of attendance at a qualified educational institution graduate school or approved vocational training and may be used to pay off federally backed education loans.
<https://www.nationalservice.gov/programs/ameri-corps/alumni/segal-ameri-corps-education-award>

Education Award Program (EAP) – An AmeriCorps program that receives a small administrative grant, member positions and Education Awards and uses nonfederal resources to pay the members' living allowance and support program costs.

Edward M. Kennedy Serve America Act of 2009 – On April 21, 2009, President Barack Obama signed the Edward M. Kennedy Serve America Act ([read more](#)). The Serve America Act reauthorizes and expands national service programs administered by the Corporation for National and Community Service (CNCS) by amending the National and Community Service Act of 1990 and the Domestic Volunteer Service Act of 1973.

eGrants – CNCS's online grant management system <https://egrants.cns.gov/espan/main/login.jsp>

Employers of National Service – A special initiative of CNCS designed to connect AmeriCorps and Peace Corps alumni with employers from the private, public, and nonprofit sectors. Through this initiative, employers have increased access to a dedicated, highly qualified, and mission-oriented pool of potential employees, and National Service alumni have additional opportunities to apply their skills in the workplace.
<http://www.nationalservice.gov/special-initiatives/employers-national-service>

Evaluation – Evaluation is the use of social science research methods to assess a program's design, implementation, and effectiveness. <http://www.nationalservice.gov/resources/evaluation>

Fiscal Year – A period of 12 months during which a particular budget is to be expended and accounted for and reported. The Federal Fiscal Year begins on October 1 and ends September 30. The Montana State Fiscal Year begins July 1 and ends June 30.

Fixed Amount Grant - allows organizations to apply for a fixed-amount per individual member service year (MSY). Organizations operate a standard AmeriCorps program with full-time members, or less than full time positions, serving in a full-time capacity only.

Formula Funding – The annual allocation awarded to each State Commission annually by CNCS. The formula allocation to each state accounts for the states populous. The Commission then solicits proposals for AmeriCorps formula funded programs and when feasible, planning grants.

Foster Grandparent Program (FGP) – One of the three National Senior Service Corps programs. Foster Grandparents devote their service to children with special or exceptional needs, and typically serve in schools.

Generally Accepted Accounting Practices (GAAP) – Refer to a common set of accounting principles, standards, and procedures issued by the Financial Accounting Standards Board (FASB).

Grantee – The direct recipient of a grant from the Corporation for National and Community Service (CNCS). In the AmeriCorps State model, the **Prime Grantee** is the state commission. AmeriCorps funds are granted directly to the state commission and are then subgranted to organizations that operate AmeriCorps programs. The prime grantee is ultimately responsible for ensuring AmeriCorps funds are used appropriately.

In-kind – Contributions and donations made in goods and services, not cash.

Learn and Serve America – Learn and Serve America was a US government program under the authority of the Corporation for National and Community Service. Its mission was to provide opportunities for students nationwide to participate in service-learning projects and gain valuable experience. In 2011 the United States House Appropriations Committee eliminated the entire budget for Learn and Serve America. As a result, Learn & Serve America, which annually funded service-learning for more than 1 million students in k-12 schools, community-based organizations, and higher education institutions for 21 years was eliminated.

Living Allowance – AmeriCorps members may receive a living allowance during the Term of Service. This is a benefit distributed incrementally to the participant, based on the term of service. A living allowance is separate from an end of service stipend (*see stipend.*) AmeriCorps members earn a **Living Allowance** - not a salary or wage.

Matching Funds – State commissions and the subrecipients they fund, must meet certain specified match requirements as a condition to receive federal funding. For every dollar of federal funds, there is a designated percentage of nonfederal funds the state commission or other organizations must provide, this is the ‘match’.

Members – Participants in AmeriCorps (AmeriCorps NCCC, AmeriCorps VISTA, and AmeriCorps State & National). AmeriCorps members **serve** with the AmeriCorps program, *they do not work for AmeriCorps or the program and they are not employees.* National Service Participants are to be referred to as **members** – not volunteers or workers. *Montana Code Annotated (MCA) 39-51-204.* <http://leg.mt.gov/bills/mca/39/51/39-51-204.htm>

Mission Statement – A mission statement expresses an organization’s or program’s vision regarding National Service and indicates the ultimate impacts to be achieved. A program’s annual objectives are typically closely connected to the mission statement, service activities and performance measures.

National and Community Service Trust Act of 1993 – The National and Community Service Trust Act of 1993 created AmeriCorps and the Corporation for National Service. The act authorized appropriations for AmeriCorps State & National, AmeriCorps NCCC, Learn & Serve America, the National Service Trust, and the Points of Light Foundation. The 1993 legislation amended the National and Community Service Act of 1990.

National Competitive Funding – An annual pool of funds against which state commissions may compete to fund AmeriCorps subrecipients in their states. Funds available are subject to Congressional appropriations.

National Day of Service – A project undertaken by a large group of participants often from many different programs and usually in conjunction with a special day to highlight service programs and their participants, such as Martin Luther King Day and Global Youth Service Day.

National Directs (AmeriCorps National) – AmeriCorps programs funded directly by the Corporation through multi-state nonprofit organizations that deploy members into more than one state.

National Senior Service Corps (NSSC) – The umbrella term that encompasses the three senior service programs: Foster Grandparents, Senior Companions, and the Retired Senior Volunteer Program (RSVP).

National Service – Results-oriented service by an individual or group of individuals that help meet the nation’s needs in the areas of education, public safety, the environment, and other human needs.

NOFA (Notice of Funds Available) – A legal notification, published in the Federal Register, describing the intention of funding that is approved and available by Congress.

NOFO (Notice of Funding Opportunity) – A legal notification, published in the Federal Register, describing indicates the intention of funding that is subject to Congressional appropriations.

NCCC (National Civilian Conservation Corps) – Common term used to refer to AmeriCorps NCCC.

Outside Employment – A term used to describe when an AmeriCorps member established employee employment status with an entity other than the service location.

Participant – Term used to describe any individual enrolled in a program funded by the Corporation; the more specific term “member,” refers to an individual enrolled in an AmeriCorps program.

Partnership – Two or more entities that have entered into a written agreement specifying the goals and activities of the relationship as well as the responsibilities, goals, and activities of each partner.

Peace Corps – The Peace Corps is a service opportunity for motivated citizens to immerse themselves in a community abroad, working side by side with local leaders to tackle the most pressing challenges of our generation. <https://www.peacecorps.gov/>

Presidents’ Summit for America’s Future – This April 1997 historic gathering in Philadelphia where former Presidents Clinton, Bush, Carter, and Ford, and Secretary of State Colin Powell called for all Americans to find ways to ensure that all children have access to the fundamental resources they need:

- Caring adults in their lives, as parents, mentors, tutors, and coaches;
- Safe places with structured activities in which to learn and grow;
- A healthy start and healthy future;
- An effective education that equips them with marketable skills; and
- An opportunity to give back through their communities through their own service.

Program – A coordinated group of activities linked by common elements such as recruitment, selection, and training of participants, and staff, regular group activities, and assignment to projects organized for the purpose of achieving the goals of meeting needs with National Service; carried out with assistance provided under the Act.

Project – An activity, or set of activities, carried out through a program that receives assistance under the Act, resulting in a specific service or improvement that otherwise would not be done with existing funds, and does not duplicate the services or functions of the organization where participants are assigned.

PSA – Term used to refer to a Public Service Announcement.

Request for Proposals (RFP) – A term which some states or organizations use to describe the document which they solicit proposals from other organizations. This document can also be known as a grant application or bid. State commissions will use RFP’s for AmeriCorps programs from non-profit organizations, local governments, higher education institution, Indian Tribes, and state agencies.

Retired and Senior Volunteer Program (RSVP) - One of the three National Senior Service Corps programs created in 1972. <http://www.nationalservice.gov/programs/senior-corps/rsvp>

Returned Peace Corps Volunteer (RPCV) – A term commonly used when referring to a Peace Corps Alumni.

SEA – State Education Agency, in Montana this is the Office of Public Instruction (OPI). <http://opi.mt.gov/>

Senior Companion Program (SCP) – One of three National Senior Service Corps programs. Senior Companions help other seniors live independently in their own homes and receive a stipend. <http://www.nationalservice.gov/programs/senior-corps/senior-corps-programs/senior-companions>

Service-Learning – A method by which students improve academic learning and develop personal skills through structured service projects that meet community needs. Service-learning builds upon students' service activities and providing them with opportunities to learn by preparing, leading, and reflecting on the service experience.

Service Location – Is the primary location where the AmeriCorps member contributes most of their service. The site is typically an eligible organization selected to provide a placement for participant(s), either as a primary service location or a short term project. Qualifications and responsibilities of service locations vary between subrecipients and should include oversight to ensure member activities are allowable and service hours are verified. *Upon enrollment, each member must be assigned to an active primary service location in eGrants within 8 days.*

Service Recipient – A community person or group who benefit from AmeriCorps service, also referred to as beneficiaries.

State Commission – A 15-25 member, independent, bipartisan body appointed by a Governor to implement service in a state. Duties of a State Commission include developing a unified State Plan for service and volunteering in the state, submission of the state's AmeriCorps application, administration of the competition for AmeriCorps State programs, oversight and monitoring of funded AmeriCorps programs, and reporting to the Corporation. <http://serve.mt.gov/commission/>

State Service Plan (SSP) – A three-year plan developed by each state commission in partnership with CNCS, the State Education Agency, and other organizations in the state. The State Service Plan describes the vision, goals, and objectives for promoting National Service and volunteering and for building a solid portfolio of high-quality programs and support services in the state. <http://serve.mt.gov/About/State-Service-Plan>

Stipend – An end of service cash benefit that is an alternative to the Education Award – an option only for AmeriCorps VISTA members. The term is **not** synonymous with living allowance. (*See living allowance.*)

Streams of Service – A term referring to the distinct types of service programs. For example, AmeriCorps State and National stream of service. This includes the major National Service programs under CNCS, AmeriCorps, VISTA, and Senior Corps (Foster Grandparents, Senior Companion Program, and RSVP). When there are joint activities the term 'cross stream' is commonly used.

Student Ownership – The notion students can make important contributions to their schools and communities.

Subrecipient/ Subgrantee - The eligible organization granted CNCS resources from OCS. An entity responsible for recruiting, selecting, and training members, providing benefits and support services, engaging regular group activities, and service assignments. The subrecipient is responsible for the AmeriCorps program and appropriate management of federal funds but may or may not necessarily oversee the daily activities of AmeriCorps members, as determined by program design.

VISTA – See AmeriCorps VISTA.

Youth Civic Engagement – The process of engaging youth in affecting policy and acting on issues in their communities.

Youth Led Service – The involvement of young people leading and providing service to schools and communities. This term should not be confused with 'youth services', which typically refers to programs where youth are the recipients of service.

*Remember to check the Mandatory Supplemental Guidance, aka the Glossary, associated with the Notice of Funding Opportunity that the program was funded, for more terms and definitions. See AmeriCorps grants on www.serve.mt.gov, then locate the correct year, funding type, and documents

When to Contact OCS

| Situation | Contact requirement | Point of contact |
|---|--|--|
| Appeal – funding decisions | Required | Executive Director |
| Budget transfer | Pre-approval required | Financial Manager |
| Changes in key grant staff | Required | Grants Manager |
| Changes to program scope | Pre-approval required | Grants Manager |
| Contract amendment | Required | Grants Manager |
| eGrants problem – application submission | Required - documentation | eGrants Helpline & Grants Manager if impact time sensitive |
| eGrants problems – general | Contact eGrants Helpdesk first | eGrants Helpline |
| Entering partnerships not included in original subgrant | Required | Grants Manager |
| Equipment purchase – unbudgeted | Required | Financial Manager |
| Grant closeout | Required | Financial Manager |
| Grant extension request | Required - 30 days in advance | Grants Manager |
| Grant funds <i>will not</i> be fully expended | If grant funds will potentially be left unspent contact OCS ASAP | Financial Manager |
| Grievance filing (service site/staff) | Recommended | Grants Manager |
| Grievance filing (member) | Required | Grants Manager |
| Late reporting – progress report | Required - extension request | Grants Manager |
| Late reporting –PER, RFR, FFR | Required - extension request | Financial Manager |
| Major audit findings | Required | Financial Manager |
| Member slots left unfilled | Required | Grants Manager |
| Member suspension | Required | Grants Manager |
| Member transfer – in | Required | Grants Manager |
| Member serious injury or death | Required | Grants Manager |
| National Service Criminal History Checks, site visit from MT DOJ. | Required | Grants Manager & Financial Manager |
| News story – program specific | Requested | Outreach Coordinator |
| National Service Day - event | Required | Outreach Coordinator |
| Pre award grant spending | Required – requires pre-approval | Financial Manager |
| Press/media events | Recommended | Outreach Coordinator |
| Press release/News coverage | Recommended | Outreach Coordinator |
| Reasonable accommodation | Recommended | Grants Manager |
| Member release– compelling personal circumstance | Optional - recommended | Grants Manager |
| Member release – for cause | Required - if a felony or drug related | Grants Manager |
| Member replacement | Required - need approval | Grants Manager |
| Reporting/submission deadlines | Consult website first | serve.mt.gov |
| Service events | Recommended | Outreach Coordinator |
| Slot conversion | Required - need preapproval | Grants Manager |
| Slots left unfilled | Required | Grants Manager |
| Training needs and opportunities | Recommended | Training Specialist |