



AmeriCorps Program Director Resource Guide



volunteerflorida

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Florida Program Director Resource Guide

Purpose of the Program Director Resource Guide

The Florida AmeriCorps Program Director Resource Guide was designed as a guide for those who administer Florida AmeriCorps programs. This guide will assist in detailing the process of monitoring, supporting and evaluating programs, and for working collaboratively to make AmeriCorps programs in Florida successful.

Please note that the information contained in this guide does not include all the legal requirements of an AmeriCorps grant. It does not constitute the Corporation for National and Community Service's official interpretation of factual or legal questions. Program Directors or individuals with particular questions should consult the National and Community Service Act of 1990 (42 U.S.C. § 12501 et seq.), the regulations issued under the Act (45 C.F.R. § 2500.1 et seq.), the Edward M. Kennedy Serve America Act, the AmeriCorps Grant State and Federal Terms and Conditions, and relevant state law and regulations. If there is a conflict between the content of this handbook and the AmeriCorps provisions, the provisions are the controlling authority.

It is important that subgrantees become familiar with all the information contained in this manual. The Florida AmeriCorps Program Director Resource Guide will be revised as needed.

Volunteer Florida and National Service

What is National Service?

National service programs engage more than four million Americans to improve individual communities, whole states and ultimately, the nation. These programs are funded through the [Corporation for National and Community Service](#) and administered by state service commissions, including Volunteer Florida.

The History of the Corporation for National and Community Service

In 1993, the Corporation for National and Community Service (also known as CNCS) was created to connect Americans of all ages and backgrounds with opportunities to give back to their communities and their nation.

The agency was created in response to The National and Community Service Trust Act of 1993 which was signed into law by President Bill Clinton on September 21, 1993. The legislation created the Corporation for National and Community Service and three CNCS administered programs (Senior Corps, AmeriCorps, and Learn and Serve America) with the responsibility of mobilizing Americans into service.

CNCS leverages the strength of grantees, participants, programs, state service commissions and the American public to build a network of programs that offer effective solutions in the six priority areas:

1. Disaster Services
2. Economic Opportunity
3. Education
4. Environmental Stewardship
5. Healthy Futures
6. Veterans and Military Families

Corporation for National and Community Service Programs

- **Senior Corps:** Senior Corps offers a network of programs that tap the rich experience, skills and talents of older citizens to meet community challenges.
- **AmeriCorps State and National:** AmeriCorps State and National offers grants that support a broad range of local service programs that engage thousands of Americans in intensive service to meet critical community needs. AmeriCorps State and National also administers grants for Indian tribes and U.S. territories who are eligible for funding that is set aside to address critical needs within their communities. *Volunteer Florida administers AmeriCorps State grants in Florida.*
- **AmeriCorps VISTA:** AmeriCorps*VISTA provides full-time members to community organizations and public agencies to create and expand programs that build capacity and ultimately bring low-income individuals and communities out of poverty.
- **AmeriCorps NCCC:** The AmeriCorps*National Civilian Community Corps is a full-time residential program for men and women aged 18-24 that strengthens communities while developing leaders through direct, team-based national and community service.
- **Volunteer Generation Fund:** The Volunteer Generation Fund, authorized by the 2009 Edward M. Kennedy Serve America Act, is designed to increase the number of people who serve in meaningful roles as volunteers dedicated to addressing important needs in communities across America.

Interested in learning more about the history of national service? Visit the CNCS [website here](#).

Volunteer Florida

Volunteer Florida (officially recognized as the Florida Commission on Community Service) receives over \$43 million in federal and state funding to support our efforts to expand national service, promote disaster resiliency and advocate for volunteerism in Florida. The agency is guided by a bipartisan board of Commissioners, who are appointed by the Governor and confirmed by the Florida Senate.

In 1994, Volunteer Florida was established to administer national service programs, such as AmeriCorps, throughout the state. After Hurricane Andrew hit Florida, Volunteer Florida evolved to serve as the state's lead agency for mobilizing volunteers and coordinating donations before, during and after disasters. The Volunteer Florida Foundation, a direct support organization, also

manages the Florida Disaster Fund, the official private fund for aiding Florida's communities after disasters.

Volunteer Florida exists to endorse volunteerism as a solution to critical issues in Florida. The agency hosts annual community service projects (i.e. Suits for Session) and manages Florida's official volunteer opportunities platform, Volunteer Connect.

Volunteer Florida's values include:

- Service – cultivate national service and volunteerism
- Leadership – lead the vanguard of state service commissions
- Collaboration – engage partners to multiply impacts
- Excellence – perform at the highest level
- Inspiration – catalyze all Floridians to serve
- Innovation – be inventive and creative in all aspects

Contract

Volunteer Florida enters into an annual contract with each subgrantee. The purpose of the contract is to establish requirements for the funding period. AmeriCorps programs submit contract requirements through Blackbaud Grantmaking, Volunteer Florida's grant management system.

Training and Technical Assistance

Volunteer Florida is committed to helping build the skills, knowledge and capacity of individuals and the organizations they serve by providing effective training and technical assistance. Annually, Volunteer Florida administers a training needs assessment to receive feedback from subgrantees. This feedback informs the content of Volunteer Florida's standard trainings. Technical assistance is centralized around developing core competencies of AmeriCorps program staff as referenced below.

Program Director Core Competencies

Volunteer Florida has developed a list of core competencies for program directors that is central to our training and technical assistance. These core competencies are intended to provide Volunteer Florida AmeriCorps programs and prospective applicant organizations with an overview of the knowledge, skills, and abilities needed for effective AmeriCorps program management. The competencies described at the end of this manual are all important and interrelated. Managing a program and grant effectively requires proficiencies in all of the core competencies. The program director need not possess all of these competencies individually, but should have strong working relationships with other professionals in their organization who do.

- Effective Grant and Program Management: program management, theory of change and continuous improvement, site management, community engagement and strengthening
- Member Management: member human resources, member support
- Fiscal Oversight and Management: financial management, sustainability

- Leadership and Development: professional development, leadership and public policy

Commission Training

The Commission will provide various trainings for programs throughout the year. The following meetings and conferences are **required**:

- New Program Boot Camp (new programs and new staff, only)
- Two Program Director Trainings.
- Monthly Webinars.

America's Service Commission (ASC)

America's Service Commissions (ASC) is a nonpartisan, nonprofit organization that represents and promotes state service commissions across the United States and territories. ASC supports commission capacity building, federal advocacy, and activation of state networks. The ASC network supplies access to the [Training Technical Assistance Directory](#) as well as a variety of resources such as webinars, example documents, trainings, message boards and event calendars through their online [Basecamp](#). All Volunteer Florida AmeriCorps programs receive access to this basecamp through Volunteer Florida's membership fees.

CNCS Knowledge Network

The Corporation for National and Community Service has a repository of training and technical assistance information for national service programs. Information can be found at <https://www.nationalservice.gov/resources>. The Knowledge Network has many online tools and training resources to strengthen your volunteer or service program.

Member Management Resources

Recruitment

My AmeriCorps - Your Online AmeriCorps Recruitment System

To assist you in reaching a national pool of potential members, you must list your program opportunities online. You will access the recruitment system through eGrants. If you are new to AmeriCorps, you will need to register to get an eGrants account. You will then need to contact the person in your agency who created the AmeriCorps eGrants account (Grant Administrator) to be given the capability to use the recruitment features. Then you are ready to begin posting opportunities, searching for applicants based on your needs, contacting applicants, reviewing applications and selecting your members. As an AmeriCorps program, you must also actively seek to recruit diverse applicants from the communities served.

Service Year Exchange

The Service Year Exchange connects individuals who want to do a service year with organizations who are looking for diverse talent to help them reach their mission. The website offers programs the ability to post information about their organization as well as their open positions. It also allows potential members the ability to post profiles about themselves showing where they would like to serve and in what field. Volunteer Florida supports fees associated with posting a

service opportunity for Volunteer Florida funded AmeriCorps programs. For more information visit <https://serviceyear.org/>.

Position Descriptions

Service assignments must be meaningful to the AmeriCorps member and the community in which the service is performed. Projects must be possible within the time available (project duration, resources, terms of service, etc.). Position descriptions should include all professional elements necessary to define the service assignment and the qualifications necessary to achieve it.

Member Eligibility

To be eligible to enroll in AmeriCorps, the individual must meet the following requirements:

- Be a United States citizen, U.S. national, or a lawful permanent resident alien of the United States;
- Be at least 17 years of age; and
- Have a high school diploma or GED or work towards obtaining one while in the program. It is a requirement to obtain a high school diploma or GED before one is eligible to use the Education Award.
- Must be clear of any record on the National Sex Offender Public Registry.
- Must have a criminal record clear of any conviction(s) of murder.

National Service Criminal History Checks

Under the Serve America Act (SAA) all subgrantees must conduct National Service Criminal History Checks (NSCHC) as described below, on all participants in AmeriCorps including staff positions. Covered positions include all AmeriCorps program staff and others who receive a salary, national service educational award, living allowance, stipend or who are listed as match under the AmeriCorps grants. Failure to comply with this directive will result in cost disallowance.

In addition to completing the NSCHC background checks on time and retaining supporting documentation, program staff (primary program staff and primary fiscal staff), must take the CNCS NSCHC e-course annually. The e-course is located at:

<http://www.nationalservice.gov/resources/criminal-history-check> and the requirement is included in the standard AmeriCorps Contract.

AmeriCorps members and program staff who are listed on the grant budget must have the following criminal history check clearance:

- A nationwide check of the National Sex Offender Public Web site (NSOPW) must be completed, including adjudication by program, before the covered individual begins service.
- Either a name or fingerprint-based search of the statewide criminal history registry in the candidate's state of residence and in the state where the person will serve or work. Must be initiated before the covered individual begins service, AND

- A fingerprint-based FBI check. Must be initiated before the covered individual begins service.
- Other background checks as required by your program or program partners (school districts, municipality, etc.) are an allowable program expense.

Members and staff should not start work or service prior to the **completion** of ALL NSCHC checks, including the required review and adjudication steps. Subgrantees NSCHC policies may include a process for accompaniment, if essential to the program design.

Ineligibility

NSCHC determines eligibility, as defined in the Serve America Act. The Serve America Act explicitly defines the following individuals as ineligible to serve or work on CNCS grants:

- Anyone who is listed, or required to be listed, on a sex offender registry is ineligible to serve or work in a covered position.
- Anyone convicted of murder (as defined in 18 U.S.C. § 1111) is ineligible to serve or work in a covered position.
- Anyone who refuses to undergo the NSCHC is ineligible to serve or work in a covered position.
- Anyone who makes a false statement in connection with a program’s inquiry concerning the person’s criminal history is ineligible to serve or work in a covered position.

CNCS Approved NSCHC Vendors

CNCS approved Fieldprint, Inc. which provides both the FBI and State checks (Florida) and can be accessed at www.fieldprintcnscs.com

CNCS approved Truescreen to provide NSOPW checks and State checks (non-Florida state checks). Truescreen can be accessed at <https://applicationstation.truescreen.com/>, using the CNCS specific agreement code: Ensnarement.

Unless alternative NSCHC process are approved in advance by Volunteer Florida, all subgrantees are required to use Fieldprint and Truescreen for criminal history check clearance for members and staff positions.

The specifics requirements of the NSCHC, including the timing and record keeping requirement are specified at [45 CFR 2540.200-.207](https://www.federalregister.gov/documents/2013/04/23/45-cfr-2540-200-207) - See also, <https://www.nationalservice.gov/resources/criminal-history-check> for more information on how to correctly conduct and document the NSCHC.

Disability Inclusion

Volunteer Florida encourages diverse AmeriCorps teams, that includes persons with disabilities to participate as national and community service members.

Definition of Disability

According to the ADA, the term "disability" means, with respect to an individual, a physical or mental impairment that substantially limits one or more of the individual's major life activities, a record of having such an impairment, or being regarded as having such an impairment. "Major life activities" means functions such as caring for oneself, performing manual tasks, walking, seeing, hearing, speaking, breathing, learning, working, etc. Additionally, a "qualified individual with a disability" is an individual with a disability who, with or without reasonable accommodations, meets the essential eligibility requirements for the receipt of services or the participation in programs or activities provided by the program.

Policy

Under Federal law, any program which receives federal funds must comply with the requirements of the Americans with Disabilities Act (ADA) and Section 504 of the Rehabilitation Act. In compliance with the Federal law, Volunteer Florida prohibits all National Service programs operating in the state of Florida from any form of discrimination against persons with disabilities in recruitment, as well as in service. No qualified individual with a disability shall, by reason of disability, be excluded from participation in or be denied the benefits of the program, services, or activities of the program, or be subjected to discrimination by the program. Nor shall the program exclude or otherwise deny equal services, programs, or activities to an individual because of the known disability.

Reasonable Accommodation

A reasonable accommodation is any modification or adjustment to a program site that will enable a qualified applicant or AmeriCorps member with a disability to participate in the application process or to perform essential service functions. Reasonable accommodation also includes adjustments to assure that a qualified individual with a disability has rights and privileges in service equal to those of individuals without disabilities.

All National Service programs shall make reasonable accommodations in practices and/or procedures when the accommodations are necessary to avoid discrimination on the basis of disability. Accommodations are "reasonable" when they are practical or feasible. According to the U.S. Equal Employment Opportunity Commission (EEOC):

It is not necessary to provide a reasonable accommodation if doing so would cause an undue hardship. Undue hardship means that an accommodation would be unduly costly, extensive, substantial or disruptive, or would fundamentally alter the nature or operation of the business. Among the factors to be considered in determining whether an accommodation is an undue hardship are the cost of the accommodation, the employer's size, financial resources and the nature and structure of its operation.

Nondiscrimination Laws

All programs must comply with all applicable provisions of state and federal laws and federal regulations pertaining to nondiscrimination, sexual harassment, equal employment opportunity

and others that are referenced annually in the General Grant Terms and Conditions and AmeriCorps Specific Terms and Conditions, associated with each grant year and included in your contract package.

Enrollment and Retention Rates

The Corporation for National and Community Service (CNCS) has the following expectations:

ENROLLMENT RATE = Total slots filled/total slots awarded.

Enrollment for programs should be 100%.

RETENTION RATE = Total members exiting with an Education Award/total slots filled.

A target of 85% for retention or program completion is desired.

CNCS realizes that many programs not yet meeting these rates are nevertheless performing well in their individual circumstances. In order to leverage limited program dollars, CNCS expects programs to strive toward improving their rates of enrollment and retention. During the application process, programs that are not meeting these standards need to offer a rationale for why not, as appropriate.

Recruitment/Retention Rate

To view enrollment and retention using the data in My AmeriCorps:

1. Log into your account via eGrants
2. Select S&N Reports
3. Select the report you wish to view from the drop-down menu (Enrollment Rate Report or Retention Rate Report)
4. Select Program year
5. Select format (PDF, Excel etc.)
6. Select Submit
7. You may open or save the report created

Member Orientation

Member orientation should prepare members for their term of service. Orientation can help them acquire the skills and knowledge they need to “get things done.” A strong orientation will pay off in program outcomes, with members who know the purpose of their service and have the skills to accomplish program objectives.

CNCS **requires** programs to cover the following topics during member orientation:

- Member rights and responsibilities;
- Specific skills and knowledge to perform service;
- Program’s code of conduct;
- Prohibited and unallowable activities;
- Drug Free Workplace rules;
- Suspension and termination policies;

- Grievance procedures;
- Equal Opportunity, Affirmative Action, Non-Discrimination policies;
- Sexual harassment awareness education;
- Specific safety procedures - member security, inclement weather;
- Sensitivity to the community;
- Introduction to National Service and AmeriCorps;
- My AmeriCorps Portal;
- Timekeeping policy and procedures

Volunteer Florida **strongly recommends** programs cover the following topics during member orientation:

- National Service history and big picture
- Volunteer Florida's role in AmeriCorps;
- Host sites and the specific communities they serve;
- Responsibilities that individuals have to themselves, their families, their community, and the nation - civic responsibility and civic reflection;
- Program rules, regulations, and benefits;
- Member handbook;
- Allowed activities;
- Living allowance;
- Staff and member roles;
- Understanding the objectives of the program and how to collect data;
- Childcare/health insurance coverage (only for programs with full-time members)
- Loan forbearance
- How to apply for state benefits (SNAP, WIC, etc.)

Member Service Gear

All members and staff must wear branded gear every day they are in service. For most programs, branded gear will include several t-shirts and/or polo shirts. Other gear, such as jackets, outdoor protective wear (hats, boots, etc.) and personal protective equipment (masks, gloves, etc.) are also allowable costs.

Branded gear must include the AmeriCorps, Volunteer Florida, and program logos. Volunteer Florida must approve all gear before it is purchased – email your program director with a proof or screenshot to begin the approval process. Volunteer Florida does not require the use of a specific vendor. See Branding and Media Requirements section of this guide.

Member Status

Member Enrollment

All Member Enrollment Forms must be entered and approved in My AmeriCorps **within 8 calendar days of a member starting service in the program**. Members must create a My AmeriCorps Portal account in order to complete their enrollment.

In 2019, CNCS changed the enrollment requirement from 30 days to 8 days. Further information on the pre-enrollment and enrollment requirements can be found here:

<https://www.nationalservice.gov/resources/member-enrollment>

Assigning Members to Service Locations

The program is required to ensure that all operating sites and all service locations are entered in the My AmeriCorps portal for all members within seven calendar days of the members' start date. The program is required to include the name of the service site, and the full physical address including zip-plus-four of the service locations where each member will be serving. If a member is serving at multiple service locations, the program must enter the site where the member serves the majority of his or her hours as the member's primary assignment.

Member Exit

All Member Exit Forms **must** be entered and approved in My AmeriCorps **within 30 calendar days** of a member exiting the program. All members must complete their term of service within one year of their start date. This completion requirement is for all members, regardless of if they have completed their required hours or not. Members who have had their term suspended may increase their service agreement by the number of days suspended but not to extend past the end of the contract year (July 31st for most programs).

The end of year survey will automatically unlock one month prior to the member's end date. However, the survey may also be unlocked manually by the program director if a member is exiting before then.

Follow this file path in eGrants to unlock the form:

In eGrants: Portal Home → Manage Programs → Select Program → View Members → Select Member whose form needs to be opened → Click 'View' next to current service term → Click unlock exit form.

Change of Status

Programs **must** have approval from Volunteer Florida prior to entering and approving a Change of Status in My AmeriCorps. Programs shall submit a written letter requesting approval. Refer to the AmeriCorps Provisions within your executed contract for policy guidance.

Release for Compelling Personal Circumstance 45 CFR 2522.230

On rare occasions, a member may be released for a compelling personal circumstance (CPC) exit. The program must provide documentation of the reason to Volunteer Florida and receive approval. The program must document the basis for determination that compelling personal circumstances prevent a participant from completing a term of service. The circumstances must be beyond a participant's control such as, but not limited to, a participant's serious illness, disability, serious illness or death of a participant's family member, a relocation of a spouse, a natural disaster etc. CNCS has determined the additional reasons for a CPC exit include: military service obligation; acceptance by a participant of an opportunity to make the transition from

welfare to work; or acceptance of an employment opportunity by a participant serving in a program that includes in its approved objectives the promotion of employment among its participants.

Compelling personal circumstances do not include leaving a program:

1. To enroll in school;
2. 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
3. Because of dissatisfaction with the program.

Release for Cause

1. A release for cause encompasses any circumstances other than compelling personal circumstances that warrant an individual's release from completing a term of service.
2. AmeriCorps programs must release for cause any participant who is convicted of a felony or the sale or distribution of a controlled substance during a term of service.
3. A participant who is released for cause may not receive any portion of the AmeriCorps education award or any other payment from the National Service Trust.
4. An individual who is released for cause must disclose that fact in any subsequent applications to participate in an AmeriCorps program. Failure to do so disqualifies the individual for an education award, regardless of whether the individual completes a term of service.
5. An AmeriCorps*State/National participant released for cause may contest the program's decision by filing a grievance. Pending the resolution of a grievance procedure filed by an individual to contest a determination by a program to release the individual for cause, the individual's service is considered to be suspended. For this type of grievance, a program may not—while the grievance is pending or as part of its resolution—provide a participant with federally-funded benefits (including payments from the National Service Trust) beyond those attributable to service actually performed, without the program receiving written approval from the Corporation.
6. An individual's eligibility for a subsequent term of service in AmeriCorps will not be affected by release for cause from a prior term of service so long as the individual received a satisfactory end-of- term performance review as described in § 2522.220(c)(2) for the period served in the first term.
7. Except as provided in paragraph (e) of this section, a term of service from which an individual is released for cause counts as one of the terms of service described in § 2522.235 for which an individual may receive the benefits described in § 2522.240 through §2522.250.

Suspension of Service

In some cases, suspension of service may be needed for member health issues, member criminal investigations, etc. During suspension, a member may not receive their living allowance or other benefits and may not accrue service hours. Staff should contact your Volunteer Florida Program Manager prior to any member suspension.

Release Prior to Serving 15 Percent of a Term of Service

If a participant is released for reasons other than misconduct prior to completing 15 percent of a term of service, the term will not be considered one of the terms of service described in § 2522.220(b) for which an individual may receive the benefits described in § 2522.240 through § 2522.250.

Term of Service Limit

(a) *General limitation.* An individual may receive the benefits described in § 2522.240 through § 2522.250 for no more than four terms of service in an AmeriCorps State and National program, regardless of whether those terms were served on full-, part-, or reduced part-time basis.

(b) *Early release.* Except as provided in paragraph (c) of section § 2522.235, a term of service from which an individual is released for compelling personal circumstances or for cause counts as one of the terms of service for which an individual may receive the benefits described in § 2522.240 through § 2522.250.

Note: If you make any changes to My AmeriCorps, you must add that same information to the member file. The My AmeriCorps system and the member files should include the same information.

Member Slots

Service Term	Service Hours	Member Service Year (MSY) equivalent
Full Time (FT)	1700	1
Three-Quarter Time (TQT)	1200	0.7
Half Time (HT)	900	0.5
Reduced Half Time (RHT)	675	0.38095240
Quarter Time (QT)	450	0.26455027
Minimum Time (MT)	300	0.21164022

Slot Conversions

Volunteer Florida may approve slot conversions for member positions. The program must submit a written request to Volunteer Florida for a slot conversion by completing the Slot Conversion Form. Volunteer Florida and the program must consider the impact on the program quality and the feasibility of successful term completion by the new member(s).

Unfilled Slot Conversions

Programs must submit a request for an unfilled slot conversion in writing to Volunteer Florida. All conversions must be National Service Trust neutral (remain at the same or lesser MSY), are subject to availability of funds in the Trust, and must comply with all assumptions on which Trust prudence and continued solvency are predicated. The total number of MSYs and Education Award amounts in the grant may not increase as a result of the slot conversion.

For example:

- 1 full-time member position (1 MSY) may be converted into 2 half-time slots (2 x .5 members = 1 MSY).
- 1 full-time member position may not be converted into 4 quarter-time positions, as the Education Awards would total more than the original (4 x 0.2646); in this example, the maximum number of allowable quarter-time positions would be 3.
- Programs can utilize the [Slot Conversion Calculator](#) to assist with slot conversions.

Refill Slots

Eligible AmeriCorps State and National programs that have fully enrolled their awarded member slots are allowed to replace any member who terminates service before completing 30 percent of his/her term provided the member who terminates is not eligible for and does not receive a pro-rated Education Award (i.e., receiving a Compelling Personal Circumstance exit). **Programs may not refill the same slot more than once.**

Slot Conversions for Refill Slots

Slot conversions on refilled slots follow the same procedures as unfilled slots. However, keep in mind the following items regarding refill slots:

- Slots must have been vacated by a member with less than 30% of their hours
- Slots must have been vacated by a member that did not receive an Education Award
- Refill slots don't appear until all awarded slots of the specific type have been filled
- With the exception of recipients whose awards have special award conditions under 2 CFR §§ 200.207 or 200.338. Programs may not refill the same slot more than once.

FY 20 Living Allowance

A program must provide a **minimum living allowance of \$14,279** per year with a maximum of \$28,558 per year to full-time members. A living allowance **is not required for less than full-time members**. If you choose to provide less than full-time members with a living allowance, you may use the following chart as a guide.

Term of Service	Minimum # of Hours	Maximum Total Living Allowance	MSY
Full Time	1700	\$28,558	1
Three Quarter Time	1200	\$19,990	.70
Half Time	900	\$14,279	.50
Reduced Half Time	675	\$ 10,852	.38
Quarter Time	450	\$7,425	.26
Minimum Time	300	\$5,997	.21

The living allowance cannot be tied to hourly service. Members within a program with the same duties and slot type must receive equal living allowance disbursements per pay period. This includes situations where members enroll in the program late or for a shortened contract.

Although these members may have to serve more hours per pay period, they must receive a living allowance disbursement equal to other members serving in the same position. Lump sum payments to catch up a member are not allowed. As a best practice, programs should advertise their living allowance for positions by the rate per pay period.

An organization may design their program to contain multiple types of member positions. Positions that have an increased scope of responsibilities and/or required skills can be established with higher living allowance disbursements. A distinct position description must be created for each position type and the program must be consistent with all members within each position.

Example 1: Distinct position descriptions for full-time members and full-time team leads.

Example 2: Distinct position descriptions for full time first year members and returning members who mentor other members as part of their duties.

Members cannot supervise other members. However, they can act as leads or mentors.

Programs must adhere to minimum and maximum living allowance requirements as defined each year in the CNCS Notice of Funding Opportunity.

Distribution of Member Living Allowance

The living allowance is designed to help members meet the necessary living expenses incurred while participating in the AmeriCorps Program. Programs must not pay a living allowance on an hourly basis. It is not a wage and should not fluctuate based on the number of hours members serve in a given time period. Programs should pay the living allowance in increments, such as weekly or bi-weekly.

Education Award

The amount of the Eli Segal AmeriCorps Education Award depends on the length of a member's term of service. The current amount of the Education Award for each term of service is as follows:

Amount of the AmeriCorps Education Award (FY 2020)

Enrollment Status	Hours	Award
Full Time	1700	\$6,195.00
Reduced Full-Time	1200	\$4,336.50
Half Time	900	\$3,097.50
Reduced Half Time	675	\$2,360.00
Quarter Time	450	\$1,638.89
Minimum Time	300	\$1,311.11

Payments made from AmeriCorps Education Award are considered taxable income in the year the National Service Trust makes the payment to the school or loan holder. For instance, if a

member uses their Education Award in 2020, they will receive an IRS Form 1099-MISC in their AmeriCorps portal account in January or February of 2021 to file with their federal (and state, if applicable) taxes.

Eligibility

Members are eligible for an AmeriCorps Education Award if they successfully complete their term of service in accordance with their Member Service Agreement. To use their Education Award, the member must have received a high school diploma or its equivalent. A member may serve while in high school, but cannot use their Education Award until after they receive their diploma, GED, or equivalent.

Award Limitations

Under no circumstances will an individual be eligible to receive more than an amount equal to the aggregate value of two full-time Education Awards. Each award received will be considered to have a value between 0 and 1. Although the *amount* of a full-time award as defined in § 2527.10 may change, the *value* of a full-time award will always be equal to 1, the value of a half-time award will always equal 0.5, etc.

The National Service Trust does not make payments to anyone other than qualified schools and loan holders. Members should meet with their financial aid counselor for information on how the institution handles disbursements and reimbursements of the AmeriCorps Education Award.

Members have seven years to use the Education Award from the date of their completion of service. They can divide up their award and use portions of it at different times, as long as it is for authorized expenditures within the specified time period. Members could, for example, apply a portion of it to existing qualified student loans and save the remainder to pay for authorized college costs in the future, or divide it between two academic years.

Using the Education Award

Education Awards may only be used at eligible schools, which are those institutions of higher education that participate in the Department of Education's Title IV student aid programs. Generally, this refers to loans that provide federal financial aid. Eligible schools may be 2-year or 4-year, public or private. However, the member need not enroll in a degree program – the Award may be used for one-off classes or experiences, provided the institution has otherwise met the criteria.

If using the Education Award to repay student loans, the loan must be backed by the federal government under Title IV of the Higher Education Act or Titles VII or VIII of the Public Health Service Act. Loans made by a state agency, including state institutions of higher education, are also eligible to be repaid. The loans must be held in the member's name; loans taken out by a parent/guardian for the member's education cannot be repaid using the Award. Costs paid for using private loans, personal loans, or credit cards are ineligible to be repaid using the Education Award.

Members will send their Education Award to either their loan provider or a college/university through the AmeriCorps portal. The National Service Trust will not provide any reminders or notifications to members about using their Education Award.

Transfer of the Education Award

Members who were 55 and older on their first day of service may transfer their Education Award to a child, step-child, foster child, grandchild, or step-grandchild. The recipient must be a US citizen, US national, or lawful permanent resident of the United States.

Segal Education Award – College/University Match

For a partial list of institutions that match the Segal AmeriCorps Education Award visit:

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

Loan Forbearance

During their term of service, AmeriCorps members are eligible to put their qualified student loan(s) into a state of forbearance. While in forbearance, interest on the principal amount of the loan continues to accrue, but the member is not required to make payments. If a member successfully completes their term of service and earns an Education Award, the National Service Trust will pay all or a portion of the interest that has accrued on the qualified student loans during this period, in proportion to the member's MSY (for instance, a half-time member will have half of the accrued interest paid.) This accrued interest paid by the Trust and, like the Segal AmeriCorps Education Award itself, is subject to income taxes.

This postponement of the student loan payment (forbearance) is not automatic. Members must request it from their loan holders by completing the National Service Forbearance Request Form in the AmeriCorps Portal. While there is no specific date during the member's term by which this must be completed, it is recommended that members complete this task early in their term.

Note – if a member is a recent college graduate, this forbearance process will take effect only after the 6-month post-graduation grace period has expired.

The National Service Trust does not grant forbearances - loan holders do. The Trust merely verifies membership in AmeriCorps and forwards the documents to the loan companies. The Trust is able to verify membership only when it has proof from a project that the individual is an AmeriCorps member.

Interest Accrual Payments

To have the National Service Trust pay all or a portion of the interest accrued on a qualified student loan, the Trust must receive verification from the Program indicating the member has completed their service and is eligible for an award.

The member must log on to their My AmeriCorps account. On the home page, they must click on the "Create Interest Accrual" link. The member must then follow the instructions, select the appropriate term of service and type of loan. Then, identify the holder of the student loan. Once

the member follows these steps and clicks “submit,” a notice is sent electronically to their loan company. A record of the request will appear in the account home page. The loan holder certifies and submits the payment request electronically to the National Service Trust for payment.

For further information regarding Interest Accrual Payments, visit:

[http://www.nationalservice.gov/programs/american-corps/segal-american-corps-education-award/using-your-segal-education-award/postponing](http://www.nationalservice.gov/programs/americorps/segal-american-corps-education-award/using-your-segal-education-award/postponing) .

Defaulted Loans

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

Public Service Loan Forgiveness

The Public Service Loan Forgiveness (PSLF) Program is intended to encourage individuals to enter and continue to work full-time in public service jobs. Under this program, individuals may qualify for forgiveness of the remaining balance due on their William D. Ford Federal Direct Loan Program (Direct Loan Program) loans after they have made 120 qualifying payments on those loans while employed full-time by certain public service employers. Full-time AmeriCorps terms of service count toward the public service employment requirements for this program. However, as the terms and requirements of this program are subject to change, members should connect with their loan holder to determine their specific eligibility and next steps.

My AmeriCorps Portal

In order to prevent a delay in the processing of Education Awards and interest payments, individuals must request payments online through my.americorps.gov. Specific questions and requests for technical assistance should be directed to the National Service Hotline – 1-800-942-2677.

Child care

Programs must provide child care through an eligible provider or a child care allowance in an amount determined by the CNCS to those full-time participants who need child care in order to participate.

1. Need. A participant is considered to need child care in order to participate in the program if:
 - (i) Is the parent or legal guardian of, or is acting in loco parentis for, a child under 13 who resides with the participant;
 - (ii) Has a family income that does not exceed 75 percent of the State's median income for a family of the same size;
 - (iii) At the time of acceptance into the program, is not currently receiving child care assistance from another source, including a parent or guardian, which would continue to be provided while the participant serves in the program; and
 - (iv) Certifies that he or she needs child care in order to participate in the program.

2. Provider eligibility. Eligible child care providers are those who are eligible child care providers as defined in the Child Care and Development Block Grant Act of 1990 (42 U.S.C. 9858n(6)).
3. Child care allowance. The amount of the child care allowance may not exceed the applicable payment rate to an eligible provider established by the State for child care funded under the Child Care and Development Block Grant Act of 1990 (42 U.S.C. 9858c(4)(A)).
4. Corporation share. CNCS will pay 100 percent of the child care allowance, or, if the program provides child care through an eligible provider, the actual cost of the care or the amount of the allowance, whichever is less.

The criteria for member eligibility are contained in 45 C.F.R. §2522.250.

Child care is provided by:

GAP Solutions Inc.

Toll-Free number (855) 886-0687

EMAIL: AmeriCorpsChildCare@gapsi.com Fax: 1-800-521-5415

Visit <https://www.americorpschildcare.com/> for the Child Care Application as well as specific information regarding the child care benefits.

Health Insurance

Programs must provide healthcare coverage to all eligible participants who meet the following requirements:

- Be a full-time member;
- Is not otherwise covered by a health benefits package providing minimum benefits established by CNCS at the time he or she is accepted into a program;
- If, as a result of participation, or if, during the term of service, a participant demonstrates loss of coverage through no deliberate act of his or her own, such as parental or spousal job loss or disqualification from Medicaid, the participant will be eligible for health care benefits.

Programs may provide health insurance to less-than-full-time members serving in a full-time capacity, but they are not required to do so.

Any of the following health insurance options will satisfy the requirement for health insurance for full-time AmeriCorps members (or less than full-time members serving in a full-time capacity): staying on parents' or spouse's plan; insurance obtained through the Federal Health Insurance Marketplace of at least the Bronze level plan; insurance obtained through private insurance broker; Medicare or military benefits. AmeriCorps programs purchasing their own health insurance for members must ensure the plan meets minimum essential coverage requirements of the Affordable Care Act.

If coverage is being provided via the Healthcare Marketplace, and thus third-party payment is not an option, programs must develop a process to reimburse members for monthly premiums. Reimbursements for health insurance premiums are considered taxable income for the member, and programs must have a way to document such reimbursements.

Programs should develop policies detailing how they will ensure members have health insurance coverage that is compliant with AmeriCorps Regulations.

Member Service Agreements

As described in the AmeriCorps Grant State and Federal Terms and Conditions, programs are required to have members sign a member service agreement. The program should ensure that the service agreement is signed on or before commencement of service but the effective date will not be before the member is enrolled in the AmeriCorps Portal. The member service should include, at a minimum, the following:

1. Member position description;
2. The minimum number of service hours (as required by statute) and other requirements (as developed by the grantee) necessary to successfully complete the term of service and to be eligible for the education award;
3. The amount of the education award being offered for successful completion of the terms of service in which the individual is enrolling;
4. Standards of conduct, as developed by the grantee or subgrantee.
5. List of prohibited activities, including those specified in the regulations at 45 CFR 2520.65 (see next section).
6. The text of 45 CFR 2540.100 (e) – (f), which relates to nonduplication and non-displacement.
7. The text of 45 CFR 2520.0-45, which relates to fundraising by members.
8. Requirements under the Drug-Free Workplace Act (41 U.S.C. 701 *et seq.*);
9. Civil rights requirements, complaint procedures, and rights of beneficiaries;
10. Suspension and termination rules;
11. The specific circumstances under which a member may be released for cause;
12. Grievance procedures; and
13. Other requirements as established by the grantee.

Programs must ensure that the service agreement is signed before commencement of service so that members are fully aware of their rights and responsibilities.

Programs must also have members review and sign a position description. This may be in a stand-alone document or included as an addendum to the member service agreement. At a minimum, it must include the following about the member's service:

- Location(s) and address(es)
- Daily or weekly schedule
- Service activities and expected outcomes
- Site supervisor and contact information
- Site-specific policies
- Procedure to notify the site of an absence

Prohibited Activities

AmeriCorps members are prohibited from the following, when they are serving as members on AmeriCorps (federal) time.

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

1. Attempting to influence legislation;
2. Organizing or engaging in protests, petitions, boycotts, or strikes;
3. Assisting, promoting, or deterring union organizing;
4. Impairing existing contracts for services or collective bargaining agreements;
5. Engaging in partisan political activities, or other activities designed to influence the outcome of an election to any public office;
6. 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;
7. 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;
8. Providing a direct benefit to:
 - a. A business organized for profit;
 - b. A labor union;
 - c. A partisan political organization;
 - d. A nonprofit organization that fails to comply with the restrictions contained in section 501(c)(3) of the Internal Revenue Code of 1986 related to engaging in political activities or substantial amount of lobbying except that nothing in these provisions 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 above, unless CNCS assistance is not used to support those religious activities;
9. Conducting a voter registration drive or using CNCS funds to conduct a voter registration drive;
10. Providing abortion services or referrals for receipt of such services; and
11. Such other activities as CNCS may prohibit.

In addition to the above activities, the below activities are prohibited as relating to:

Nonduplication and Nondisplacement (45 CFR §§ 2540.100(e)-(f))

Fundraising by Members (CFR §§ 2520.40-.45)

Census Activities. AmeriCorps members and volunteers associated with AmeriCorps grants may not engage in census activities during service hours. Being a census taker

during service hours is categorically prohibited. Census-related activities (e.g., promotion of the Census, education about the importance of the Census) do not align with AmeriCorps State and National objectives. What members and volunteers do on their own time is up to them, consistent with program policies about outside employment and activities.

Election and Polling Activities. AmeriCorps member may not provide services for election or polling locations or in support of such activities.

Allowable Activities

Allowable activities are those activities that were approved by Volunteer Florida and CNCS in the final grant application. These activities fit within the program's logic model and work to address the community need.

At least 80% of member time must be spent doing direct service, 10% can be spent fundraising and 20% can be spent in training. Consult with your Volunteer Florida Program Manager prior to engaging in any fundraising activities, as they are not recommended.

Member Supervision

Grievance Procedure

All programs must establish a grievance procedure for members and review the procedure with members. This grievance procedure should be included in the AmeriCorps Member Service Agreement (MSA). Refer to Federal regulation [45 CFR 2540.230](#) for a full list of requirements.

Drug-Free Workplace

In accordance with AmeriCorps Provisions, programs are required to give notice about the Drug-Free Workplace Act to members (Drug-Free Workplace Act, 41 U. S. C. 701 et seq., implementing regulations, 45 C. F. R. 2542). The Drug Free Workplace statement should be included in the Member Service Agreement. Programs should report any member arrest to Volunteer Florida. Appropriate action must be taken including member suspension or release for cause consistent with the Corporation for National and Community Service's rule on termination and suspension of service.

Member Timesheets

Volunteer Florida will conduct a review of member timesheets during program site visits or desk audits. If problems are found during the initial review such as inconsistent calculations, unauthorized timesheets, prohibited activities, etc., it will be considered a compliance issue and may require a complete review of all member timesheets.

Member timesheets must include the following:

- Program, AmeriCorps, and Volunteer Florida logos
- Member's printed/typed name
- Days/dates the timesheet covers
- Times in and out (note – as members are entitled to a meal break, timesheet should have spaces for morning and afternoon service hours)

- Location of service
- Number of hours in direct service, training, and fundraising per day (note - fundraising activities are not applicable to all program models. This line can be deleted from the timesheet if it is not relevant.)
- Number of hours in direct service, training, and fundraising for the week or pay period
- Total number of hours for the week or pay period
- Comments section (to be used if the member served outside of their typical service schedule, such as a Saturday service day or supporting an after-school event)
- Certification statement confirming that the signatories have filled out the timesheet correctly and understand that falsification of this document is punishable by law
- Spaces for the member, site supervisor, and AmeriCorps program director to sign and date

To comply, the timesheet must also:

- Be signed and dated by the member after all hours have been served for the week or pay period
- Be signed by the site supervisor and/or program director only after the member has signed

It is a best practice that the timesheet also includes a year-to-date total and weekly expectation moving forward, so the member can easily see whether they are on track with their hours.

Electronic Timesheets

Volunteer Florida strongly recommends that programs utilize an electronic timekeeping system. The minimum standard for electronic timekeeping systems is as follows:

1. A written policy is in effect establishing the use of electronic timekeeping system as your system of record;
2. A secure, verifiable electronic signature system (a) identifies and authenticates a particular person as the source of the electronic signature; and (b) indicates such person's approval of the information contained in the electronic message;
3. Once appropriate electronic signatures have been applied, no changes may be made unless there is a clear, auditable record of the revision.

Public Assistance Programs

Food Assistance Program

A member's food assistance benefits are not affected because a member receives the AmeriCorps living allowance. This means that a member's benefits should not be decreased, increased, or terminated because he or she receives the living allowance.

Unemployment Benefits

AmeriCorps members are **not entitled** to unemployment benefits. The Corporation for National and Community Service has interpreted federal legislation to mean that there is no employer-employee relationship between members and programs.

Supplemental Social Security

Supplemental Security Income (SSI) is a federal program that provides a monthly cash benefit to low-income individuals who are aged, blind, or who have a disability. In 2008, the Heroes Earnings Assistance and Relief Tax Act (“the HEART Act”) was enacted, making AmeriCorps more accessible to people with disabilities). Under the HEART Act, the Social Security Administration does not consider individual’s receipt of AmeriCorps benefits for purposes of SSI eligibility. The Heart Act excludes “any benefit (whether cash or in-kind)” and so covers the living allowance, health insurance, child care, and the education award (and related interest payments). For general questions about SSI or the terms used in this answer, go to <http://www.socialsecurity.gov/ssi/index.htm>.

For information about how AmeriCorps benefits interact with other types of federal benefits: <http://www.serviceandinclusion.org/index.php?page=ssaresources>

Program Management

Match

Programs are required to meet the budgeted match as approved in the annual application submission. In the rare case, that a program is not able to meet the budgeted match, that program must submit a letter of consideration to Volunteer Florida with explanation. Volunteer Florida will review and provide response. All programs must meet the federally required match associated with the number of years of funding received. CNCS funds may be reduced by Volunteer Florida for failure to meet the minimum match requirements.

Subject to the requirements of § 2521.45, the match share of program costs will increase as of the fourth consecutive year that you receive a grant, according to the following timetable. (This is not applicable to Fixed Award recipients). A subgrantee must have contributed matching resources by the end of the contract year.

	YR 1	YR 2	YR 3	YR 4	YR 5	YR 6	YR 7	YR 8	YR 9	YR 10
Minimum Overall Share	24%	24%	24%	26%	30%	34%	38%	42%	46%	50%

In-Kind Match

The burden of guaranteeing fair market value of an in-kind resource lies with the program. Whenever possible in-kind contributions should show in the program’s general ledger as both income and an expenditure. If this is not possible there should be written policy explaining why and how this is tracked.

In-Kind Contribution Verification

Forms documenting in-kind contributions must include:

- Date of contribution

- Printed name of the donor
- Signature of the donor certifying value
- Description and value of the contribution
- Method of valuation
- Donor verification that funds are not from other federal sources
- Statement that donor intends the contribution to benefit the AmeriCorps project.

Budget

Pre-Award Costs

Programs may request pre-award costs for costs incurred 90 days prior to start date ([S2543.25](#)).

Total pre-award costs may not exceed 20% of the total of the CNCS share budget in Sections I and III. No funds may be expended in Section II. Programs submit a letter to Volunteer Florida that describes the items of cost, line items impacted and total requested pre-award costs. Volunteer Florida will review and provide response including approval, if applicable. Approval of pre-award costs does not authorize subgrantee to have AmeriCorps members begin serving. AmeriCorps members may only begin service after a grant award has been issued. All pre-award costs are incurred at the risk of the program. Neither CNCS or Volunteer Florida is under any obligation to reimburse a program for these costs if the program does not receive an award or if the award is less than anticipated and inadequate to cover such costs.

Budget Modifications

Volunteer Florida understands that AmeriCorps programs must sometimes modify their budget during the program year. Programs may submit a Budget Revision Request (Contract Exhibit V) up to four times annually. Approval must be obtained by Volunteer Florida in advance and Volunteer Florida reserves the right to disallow requested revisions.

A Budget Revision Request must be submitted if the program requests to add a budget line item, adjust a budget line associated with member slot conversions or adjust a line item by ten percent (10%) or more of the total Provider Budget. A Budget Revision Request must be received if the program request changes to the cumulative and/or aggregate budget line items by 10% or more of the total budget. Grantees may transfer funds among approved direct cost categories when the cumulative amount of such transfers does not exceed 10% of the total budget.

For more information, please refer to Volunteer Florida financial training and AmeriCorps rules and regulations found at: <https://www.nationalservice.gov/build-your-capacity/grants/managing-ameri-corps-grants#AmeriCorps Provisions>.

Source Documentation

All source documentation related to the Periodic Expense Report (PER) is to be retained by subgrantee. Source documentation includes the following:

- Staff and Member time sheets that identify time spent on the AmeriCorps Grant and pay period dates.

- Payroll Registers or Paycheck Stubs that identify salary, FICA withholding, pay dates and pay period dates.
- Fringe benefits invoices for health care and other benefits with complete listing of Staff/Member and premiums paid for each.
- Proof of payment that includes: Copies of canceled checks or Credit card statement and proof of payment for the credit card for all expenditures.
- Original invoices that identify all purchases or detailed receipts for all expenditures.
- Travel reimbursement vouchers and mileage log for Staff and Member travel.
- Copies of contract for services and objectives related to Contractual and Consultant Services.
- Sign-In/Sign-Out sheets and invoices from Trainers that identify training dates & types of training provided.
- Copies of lease agreement which clearly identifies service location, rental agreement period and monthly/annual cost.
- Copies of deposit slips or bank statements verifying deposits.
- Cost allocation plan.
- Indirect cost plan.

Grant Closeout

Programs shall submit, within 45 calendar days after the date of completion of the award, all financial, performance, and other reports as required by the terms and conditions of the award.

Program Progress

Performance Measurement

Performance measurement is the process of regularly measuring the outputs and outcomes produced by a program. Performance measurement affords the ability to track both the amount of work done by a program and the impact of this work on a program's beneficiaries.

Performance measurement is a useful tool for managing your program. It allows you to track the progress of your program towards larger goals, and to identify program strengths and possible areas for improvement. Ultimately, performance measurement information will ensure program accountability, and will help improve services and client outcomes.

Progress Reporting

AmeriCorps programs are required to submit three progress reports to Volunteer Florida annually. Progress reports monitor a program's progress toward meeting its annual program objectives, assess program strengths and challenges, highlight unique program achievements, and identify opportunities for training and technical assistance.

Progress reports, are due after the first quarter (November 15th for August start programs, April 15th for January start programs), at mid-year (February 15th or July 15th) and at end of year (August 15th or January 15th). Reports are submitted via the Blackbaud Grantmaking system. Volunteer Florida program staff review, provide clarification as applicable and compile as part of

an aggregate to CNCS. These closeout documents are required by the terms of the award and the Volunteer Florida contract. Volunteer Florida typically requests clarification of required reports from subgrantees.

The Commission expects that all progress reports are thoughtfully constructed in such a way that they provide an accurate reflection of the program's accomplishments and challenges for the reporting period. At a minimum, programs must ensure that:

- Program impact should be clearly stated.
- Challenges and successes should be clearly outlined.
- Measures to address challenges, improve the program, and/or comply with federal laws and regulations are clearly identified.
- Special care should be taken to explain any performance measures that have not been or are not on track to being met. Explain what is being done to improve performance and if or how the program expects to reach the goal by the end of the grant year.
- Programs must also explain any performance goal in which the actuals achieved significantly exceeded the expected target. Programs should regularly evaluate their forecasting to ensure each new grant application has progressive and realistic targets for their outputs and outcomes.
- Programs must ensure that all data is reported but not duplicated.
- Data from all programs is compiled as aggregate demographic information which is reported to CNCS.
- Volunteer Florida staff will review data bi-annually for evidence of duplication or any other indicators of inaccurate reporting.
- Any issue identified with the mid-year report will be addressed via the clarification process.
- Source documentation will be reviewed by Volunteer Florida staff during programmatic site visits or during the end of year close out, to verify validity, as applicable, associated with program risk level.

Program Monitoring

The goal of program monitoring is to ensure compliance with applicable Federal requirements, and ensure that performance goals are being achieved. In addition, program monitoring seeks to prevent compliance issues from happening by setting up strong systems for training and oversight, detect any compliance issues as soon as they occur through robust monitoring strategies; and enforce corrective actions to ensure that the compliance issues are resolved promptly and preventative measures put in place for the future.

Components of Monitoring

- Annual Risk Assessment
- Program Document Review
- First Quarter, Mid-Year and End of Year Progress Reports
- Fiscal Desk Audit and/or Review
- National Service Criminal History Check Review

- Programmatic Desk Audit or Site Visit including:
 - Enrollment/Retention Review
 - Member File Review
 - Data Review
 - Document Review
 - Staff/Member Timesheets Review
 - Member Meeting/Service Site Meeting(s), as applicable
- Program Training
- Program Technical Assistance

Expectations

Enrollment Rate – 100%

CNCS expects programs to fill 100% of the slots that they are awarded. Written explanation must be provided, at a minimum, during the mid-year and end of year progress reporting cycles for any rate below 100%. The program must also provide a detailed explanation of what is being done to improve the enrollment rate. Failure to meet the enrollment rate may affect future funding decisions.

Retention Rate – 85%

Retention refers to the percentage of enrolled members that remain with the program for their full term and are exited successfully with an education award. For all programs, the expectation for retaining members is 85%. Written explanation must be provided during the mid-year and end of year progress reporting cycles for any rate below the expectation level. The program must also provide a detailed explanation of what is being done to improve the retention rate. As a result, failure to meet the retention rate may affect future funding decisions.

30 Day Exits in eGrants – 100%

Programs must ensure that each member is exited from the eGrants system within 30 days of their last day of service. Written explanation must be provided during the mid-year and end of year progress reporting cycles for any rate below 100%. The program must also provide a detailed explanation of what is being done to correct any non-compliance.

Program Risk Assessment

On at least an annual basis Volunteer Florida staff will assess the risk associated with each program. Program risk assessments are used to allow Volunteer Florida to effectively monitor compliance and progress of AmeriCorps State programs in Florida and to provide an adequate level of both on-site and off-site technical assistance. Monitoring activities will occur to support the program based on the risk assessment (high, medium, low). The overall monitoring strategy will allow for the most time-intensive monitoring of the highest risk projects, with less time-intensive monitoring strategies applied, as appropriate, to lower risk projects. Those programs in their first year, will automatically be scored as high risk.

Program Monitoring Responsibilities

Each program must have and implement a plan for oversight and monitoring to ensure that its service locations have agreed to comply and are complying with the current AmeriCorps State and National Grant Provisions and other relevant grant requirements. This plan should include policies and procedures on training, oversight and monitoring of program’s service site locations.

Program Evaluation

Evaluation allows AmeriCorps programs to build their evidence base, demonstrate what works, and make continuous improvements to their program models.

Per the AmeriCorps regulations 45 CFR §§ 2522.700-740, all AmeriCorps State Programs must adhere to CNCS evaluation requirements.

If you are....	You will submit an....
AmeriCorps State Formula grantee	Follow the CNCS guidance below, depending on size of grant
AmeriCorps State Competitive grantee with an annual CNCS grant of \$500,000 or more	Independent Impact Evaluation
AmeriCorps State Competitive grantee with an annual CNCS grant of under \$500,000	Internal or Independent Evaluation

If you are recompeting for the first time (submitting a new application after a three-year period of funding) you are required to submit an Evaluation Plan. If you are recompeting again, you are required to submit a completed Evaluation with your application and an Evaluation Plan for the subsequent three-year period. The evaluation cycle continues with each three-year period.

Plan for Sustainability

Volunteer Florida defines a sustainability plan as an organizational plan that will provide for a stronger infrastructure and diversity of financial and in-kind support to yield strong programs with decreased reliance on federal funding. Programs are required to submit a sustainability plan after their first three years of funding and after each subsequent three-year period.

Records Retention

All deliverables, including grant records, reports and program and participant data; financial records, supporting documents, statistical records and any other documents (including electronic storage media) arising out of this AmeriCorps contract for a period of six (6) years after contract end, must be retained. If an audit has been initiated and audit findings have not been resolved at the end of six (6) years, the records shall be retained until resolution of the audit findings or any litigation which may be based on the terms of this subcontract.

Branding and Media Requirements

Branding Requirements

As subgrantees of Volunteer Florida and ultimately the Corporation for National and Community Service (AmeriCorps), it is required that whenever and wherever you brand your program, the Volunteer Florida and AmeriCorps Florida logo are presented with it (also known as tri-branding). When tri-branding, all three logos (your logo, Volunteer Florida logo and AmeriCorps Florida logo) should be the same in size and dimension.

Volunteer Florida Logo

The Volunteer Florida logo and branding guide may be [found here](#). All requests to use the Volunteer Florida logo should be sent to your Program Manager prior to use. For example, if ordering merchandise, a proof of the item with the logo must be sent and approved by Volunteer Florida before ordering. The same applies to signs, promotional items, websites, press releases, etc.

AmeriCorps Florida Logo

Branding requirements and recommendations for AmeriCorps grantees and members can be [found here](#). Branding requirements are also addressed in the Specific Terms and Conditions by grant year which can be [accessed here](#).

When branding, the AmeriCorps Florida logo should be used. If talking or writing about AmeriCorps, the word “AmeriCorps” may be used. To download the AmeriCorps Florida logo, please [click here](#). The AmeriCorps Florida logo should be used in accordance with the guidance provided above by the Corporation for National and Community Service.

Media Policy

As subgrantees of Volunteer Florida, your organization and its members serve as a representative of the State of Florida, AmeriCorps and Corporation for National and Community Service. Before speaking to or interacting with the media, you should notify your AmeriCorps Program Manager.

When interacting with the media, programs should clearly represent the program as an AmeriCorps program and members as AmeriCorps members. They should also clearly convey to the media that this should be reflected in any broadcast or publication. It is the program’s responsibility to ensure that the program and members are represented as affiliated with AmeriCorps by the media.

VIP Policy

Volunteer Florida kindly asks your organization to please notify your AmeriCorps Program Manager before a VIP visit. A VIP could include an elected official, political candidate, professional athlete, celebrity, etc.

Additional Resources

Corporation for National and Community Service Website:

<http://www.nationalservice.gov/>

CNCS National Service Knowledge Network:

<http://www.nationalservice.gov/resources>

Volunteer Florida Website:

[www://volunteerflorida.org](http://www.volunteerflorida.org)

Member Service Gear

<https://gooddeed.org/amicorps.aspx>

<https://amicorps.nationalservicegear.org/store/catalog/amicorps>

<http://www.companycasuals.com/careeruniforms/start.jsp> -Ph.208.342.8346

Toll Free 800.698.8346 Fax 208.342.9124

AmeriCorps Education Award Information

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

AmeriCorps Logos

<http://www.nationalservice.gov/newsroom/marketing/logos/>

AmeriCorps Forms

<http://www.nationalservice.gov/programs/amicorps/current-members/forms>

Manage Current Grants

<http://www.nationalservice.gov/build-your-capacity/grants/managing-amicorps-grants>

Evaluation Policies

<https://www.nationalservice.gov/resources/evaluation/cnsc-evaluation-policies>

AmeriCorps Program Core Competencies

These core competencies are intended to provide Volunteer Florida AmeriCorps programs and prospective applicant organizations with an overview of the competencies needed for effective AmeriCorps program management. A competency is a combination of knowledge, skills and abilities that are required to perform a task. Competencies described here are all important and interrelated. Managing a program and grant effectively requires proficiencies in all of the core competencies. The program director need not possess all of these competencies individually, but should have strong working relationships with other professionals in their organization who do.

	COMPETENCY	PROGRAM STAFF WORKING WITH AMERICORPS PROGRAMS WILL POSSESS THE ABILITY TO...
Effective Grant and Program Management	Program Management	Develop and maintain sound fiscal and organizational management systems and practices compliant with federal laws and regulations, CNCS requirements and Volunteer Florida policies and procedures.
	Theory of Change and Continuous Improvement	Define and revise a Theory of Change for how the program activities will lead to long term results, including performance measures with outputs and outcomes; develop and utilize appropriate data collection instruments, analyze data gathered, report on the performance as demonstrated by the data, and utilize this data to make improvements to the program.
	Site Management	Develop strong partnerships with member service sites, supported by written agreements, intended to support overall program goals and quality member experiences. Ensure proper training and monitoring of sites and, where possible, incentivize strong site management through a competitive application process.
	Community Engagement & Strengthening	Work with individuals and organizations to identify community needs, leverage community assets, and position program or project as a strategy for solving community problems, ideally as part of a collective impact model.
Member Management	Member Human Resources	Utilize sound human resource and inclusion practices and principles to recruit, enroll and retain member positions as detailed in the approved grant. Provide members with written service agreements outlining program requirements. Ensure that member placements are developed based upon a program design that is reflective of community need and that member activities contribute to the program goals. Effectively recruit and retain a corps that represents the overall diversity of the community it serves.
	Member Support	Develop and conduct a comprehensive member training plan, including member leadership development, designed to ensure that members receive the federal and state required trainings, and maintain appropriate documentation thereof. Work to ensure that members have the skills and training necessary to successfully carry out their specific service activities. Develop partnerships that enable well-rounded, high quality training inclusive of adult learning strategies.
Fiscal Oversight and Management	Financial Management	Actively participate in managing the budget of the program. Work cooperatively with financial and leadership staff to develop practices that effectively plan for and manage program funds and provide for accurate, complete and current documentation of the financial status of the AmeriCorps program.
	Sustainability	Develop financial and non-financial support including, but not limited to, creating a sustainability plan, identifying potential sources of funds, developing funding and partnership proposals, presenting requests for assistance and securing adequate cash and in-kind match.
Leadership Development	Professional Development	Plan and participate in skill and knowledge-building educational opportunities that promote personal and professional growth. Opportunities should be related to issues that impact the program, broader community needs, evolving national priorities and the competencies outlined in this document.
	Leadership & Public Policy	Cultivate leaders and champions within AmeriCorps and the national service network. Maintain a working knowledge of federal and state legislation, national governing policy, and policy trends that affect the implementation of national service programs. Support Volunteer Florida in promoting AmeriCorps, the national service movement, and volunteerism.

Program Management	Develop and maintain sound fiscal and organizational management systems and practices compliant with federal laws and regulations, CNCS requirements and VF policies and procedures.		
QUALITY INDICATOR	STRONG (PHASE II)	EMERGING (PHASE I)	STRUGGLING
Program Design Aligned with Approved Grant	Develop a program design model that supports the Theory of Change (TOC). All member activities are in alignment with the Program Design and include an evidence-base for the approach and member activities and intervention.	Member activities are in support of the Program Design outlined in the approved grant application, though they may vary between sites.	Member activities vary widely based on the skills of the recruited member and/or of the site. Poor understanding of Program Design.
Using Governing Documents to Understand Federal & State Requirements	Strong understanding of federal and state requirements and their applications. Ability to identify and interpret federal and state policies governing effective program management.	Ability to locate the relevant federal and state references in the VF PD Handbook, federal regulations, provisions, application instructions, etc.	Limited knowledge of federal and state requirements.
Internal Communication & Notification to VF	Maintain regular internal communication and with VF Program Officer regarding all facets of the program through regular reporting, appropriate notice and request for amendments, etc. All relevant staff read and respond to VF communication on a regular and timely basis.	All internal staff are actively updated on program. Staff provide updates to VF of developments as required by CNCS and VF. Communicate with VF during regularly scheduled meetings/calls.	Limited communication internally and with VF staff. Lack of responsiveness to VF inquiries and failure to respond or participate in VF scheduled communication and outreach.
Appropriate Program Activities	Thoroughly understands approved grant application, CNCS provisions and regulations and VF policies and procedures. Identifies area(s) of possible non-compliance and proactively develops procedures to address these issues and ensure compliance.	Possess a working understanding of grant application and the prohibited activities. Procedures to address non-compliance are created in real-time in response to events.	Limited knowledge of approved grant application, CNCS provisions and regulations and VF policies and procedures.
Programmatic Record Keeping	Implement record keeping plan to maintain 100% compliance. Annually revise and modify record keeping process to adhere to CNCS and VF policies and procedures.	Create a system for collecting, organizing and retaining records. Implementation may be inconsistent across areas (finance, HR, etc.)	Limited knowledge of record keeping and retention policies.
Program Identification	All program staff, site staff, and members clearly and consistently identify as part of the AmeriCorps network. Strong promotion of the AmeriCorps brand.	Understand that the program is within the AmeriCorps network. Signage is present at main sites and on members, but inconsistent at satellite locations and on staff.	Limited identification with AmeriCorps. Little connection to AmeriCorps brand.

Theory of Change & Continuous Improvement	Define and revise a Theory of Change for how the program activities will lead to long term results, including performance measures with outputs and outcomes; develop and utilize appropriate data collection instruments, analyze data gathered, report on the performance as demonstrated by the data, and utilize this data to make improvements to the program.		
QUALITY INDICATOR	STRONG (PHASE II)	EMERGING (PHASE I)	STRUGGLING
Theory of Change (TOC)	Thorough understanding of Theory of Change; well-developed TOC that identifies the need and has well-defined, evidence-based interventions targeted at the need. Supporting logic model measures impact of the intervention.	Logic model is developed, but supporting Theory of Change is not well-defined or is not well-supported by evidence.	Limited knowledge of TOC and lack of development of TOC model to support program.
Performance Measurement	Thorough understanding of outputs and intermediary and end outcomes; integrate a comprehensive timeline and strategies for gathering data and analyzing results in concert with other organizational evaluation efforts.	Explore strategies for measuring performance, has developed outputs and outcomes to measure program impact; develop a timeline to gather data and analyze results.	Limited knowledge of performance measures. Lack of timeline for data collection analysis. Inability to gather data and analyze results or collect data that does not meaningfully demonstrate program impact.
Data Collection Tools	Use a variety of validation instruments and methods to successfully measure program impact, annually review instruments and strategies to determine effectiveness.	Identify the instruments and strategies for measuring program data.	Limited knowledge of data collection instruments and methodology.
Evaluation	Effectively conduct and utilize information from a 3-year evaluation designed to assess the program's Theory of Change to modify and improve the program.	Explore strategies and methodologies for conducting a program evaluation. Information may be used to modify program.	Limited knowledge of program evaluation. Lack of rigorous evaluation process or methods.
Data Dissemination	Communicate relevant data with stakeholders through a variety of methods; obtain feedback from stakeholders to inform improvements in evaluation and dissemination efforts.	Identify stakeholders and the relevant data appropriate for each audience.	Limited knowledge of the connection between evaluation and the importance of sharing impacts with stakeholders.
Continuous Improvement	Successfully seek out and utilize feedback and performance measure data to inform overall program improvement and innovation; systems and activities are modified accordingly.	Explore strategies for collecting feedback and program input; identify timeline for implementing strategies.	Limited knowledge of feedback and evaluation information for program improvement.

Site Management	Develop strong partnerships with member service sites, supported by written agreements, intended to support overall program goals and quality member experiences. Ensure proper training and monitoring of sites and, where possible, incentivize strong site management through a competitive application process.		
QUALITY INDICATOR	STRONG (PHASE II)	EMERGING (PHASE I)	STRUGGLING
Site Recruitment	Conduct regular review of portfolio of sites to ensure sites are addressing the needs identified within the Theory of Change (TOC). Competitive process is used to outreach, screen and select sites for member placements.	Same sites are utilized each year without regard for their effectiveness. No opportunities for new sites or competition among sites.	Failure to identify sites for all members. Selected sites do not meet obligations.
Site Development	Implement strategy to monitor sites and provide continuous guidance, communication, and support.	Educate sites regarding program goals, member activities, CNCS and VF requirements and policies.	Limited action related to site management and development.
Site Management	Written document fully details the agreement between site and sponsor, including financial and supervisory obligations. Document is reviewed and revised annually.	Written document covers key components of the partnership for member placement and supervision.	Lack of formal, written agreement or poorly detailed written document.
Site Input	Utilize annual formal evaluation process to collect input from sites to improve program functionality. Use input to make changes that improve efficiency or effectiveness of program.	Collect feedback informally from sites to hear their concerns and successes. Attempt to integrate feedback in next program year.	Failure to collect or utilize input from sites to improve program, activities or processes.
Site Supervisor Training	Provide regular training and technical assistance opportunities for site supervisors, designed to provide accurate information and respond to questions. Utilize written site supervisor manual to support effective site management.	Have “open door policy” for site supervisors to raise questions or request technical assistance. Site staff are trained once per year.	Poor communication and lack of understanding of the importance of strong site supervision and management.
Site Monitoring	Conduct regular monitoring of all aspects of site management. Provide written reports and follow up on compliance and continuous improvement issues.	Provide informal feedback to sites when compliance issues are noted.	Failure to monitor sites or failure to address compliance or continuous improvement issues.

Community Engagement & Strengthening	Work with individuals and organizations to identify community needs, leverage community assets, and position the program or project as a strategy for solving community problems, ideally as part of a collective impact model.		
QUALITY INDICATOR	STRONG (PHASE II)	EMERGING (PHASE I)	STRUGGLING
Collective Impact Model	Key partner in aligned cross-sector strategy designed to address the same goals and measuring the same impact through coordinated action and shared learning. Effort includes government, corporate and nonprofit sectors, with backbone organization and continuous communication.	Begin to conduct outreach and make connections in the community; join existing networks and establish relationships to position the program.	Limited knowledge of outreach and collaboration strategies; unaware of how to effectively position service as key community strategy.
Community Needs Assessment	Systematically collect data and enact processes that enables active learning of current needs and course correcting as progress is tracked towards common goals.	Explore needs assessment strategies related to program goals and identify appropriate methods for different audiences.	Limited knowledge of needs assessment strategies and changing community issues.
Leveraging Community Assets	Successfully identify and leverage community assets to strengthen programming and community connections. As part of a collective impact model, pursue prioritized area for action in a coordinated way.	Understand the landscape of key players and the existing work underway; identify baseline data on problem to develop case for change and a governance structure that includes strong, credible champions.	Explore strategies for identifying and leveraging community assets; identify and begin utilization of strategies. Limited knowledge of community assets and how to leverage them.

Member Human Resources	Utilize sound human resource and inclusion practices and principles to recruit, enroll and retain member positions as detailed in the approved grant. Provide members with written service agreements outlining program requirements. Ensure that member placements are developed based upon a program design that is reflective of community need and that member activities contribute to the program goals.		
QUALITY INDICATOR	STRONG (PHASE II)	EMERGING (PHASE I)	STRUGGLING
Member Recruitment	Utilize effective strategies for recruiting and selecting appropriate members that reflect the demographics of the community served. Recruit more candidates than slots available to ensure a full corps.	Identify effective strategies for member recruitment. Recruits close to a full corps or utilize mid-year cohort to reach MSY target.	Limited knowledge of strategies pertaining to member recruitment. Recruitment efforts fail to bring in enough candidates to fill slots.
Member Enrollment & Exit	Members are enrolled and exited in eGrants in a timely fashion, with proper notice to VF when necessary. Member eligibility requirements (citizenship, age, criminal history, etc.) are always met and clearly documented in files.	Nearly all members enrolled and exited by deadlines. Minor problems with documentation in member files.	Member enrollment and exit requirements and documentation rules not met or clearly understood.
Program Design & Member Slots	Ensure member placements are aligned with the program's Theory of Change (including dosage, activities, intervention, etc.). Very few to no member slot conversion requests.	Make numerous modifications to program design and requests approval for multiple slot conversions.	Member placements based on member preferences and availability, rather than community need.
Member Service Agreements & Position Descriptions	Fully compliant position descriptions and service agreements accurately detail member activities that are in alignment with the TOC and approved grant award. Service agreements include required and suggested items.	Position descriptions are well detailed but seem to lack direct connection to TOC. Know where requirements for service agreements are listed.	Failure to understand CNCS prohibited activities or other key requirements for member service. Service agreements and position descriptions out of compliance.

Member Human Resources (cont)	Utilize sound human resource and inclusion practices and principles to recruit, enroll and retain member positions as detailed in the approved grant. Provide members with written service agreements outlining program requirements. Ensure that member placements are developed based upon a program design that is reflective of community need and that member activities contribute to the program goals.		
QUALITY INDICATOR	STRONG (PHASE II)	EMERGING (PHASE I)	STRUGGLING
Member Benefits	Program staff have in depth knowledge of all benefits available to members and members maximize their use of available benefits.	Program staff can explain all benefits to members. Members are aware of available benefits.	Program staff do not correctly understand all benefits. Members are uninformed of all available benefits.
Member Timekeeping and Term Management	Monitor members' service progress. Ensures members have adequate time and activities to successfully complete their service. Utilizes effective strategies for retaining members for their entire term of service.	Work with members who identify likely challenges with completing term to ensure service hour requirements are met. Identify effective strategies to retain members.	Failure to monitor member hours and/or failure to ensure that site provides adequate opportunities for member to complete hours. Limited knowledge of tactics pertaining to member retention.
Member Discipline	Effectively utilize service agreement to support strong member human resource management practices. Follow disciplinary procedures and implement regular evaluation process to provide feedback to members.	Conduct regular evaluation of members, in partnership with site supervisors. Formal disciplinary process may only be used in a crisis situation.	Limited knowledge of effective member human resource practices and lack of awareness of role of member service agreement.
Member Records	Appropriate and complete documentation for all member-related activities is maintained according to grant requirements. All records are clearly organized, and documents are easily located.	Program understands member file requirements and has basic system in place for gathering and maintaining required member file information.	Member files are incomplete and out of compliance with grant requirements.

Member Support	Develop and conduct a comprehensive member training plan, including member leadership development, designed to ensure that members receive the federal and state required trainings, and maintain appropriate documentation thereof. Work to ensure that members have the skills and training necessary to successfully carry out their specific service activities. Develop partnerships that enable well-rounded, high quality training inclusive of adult learning strategies.		
QUALITY INDICATOR	STRONG (PHASE II)	EMERGING (PHASE I)	STRUGGLING
Member Training Plan	Implement year-long training plan that encompasses required trainings, provides site-specific skills and offers relevant professional development.	Provide basic training to fulfill requirements at the program and at the service sites.	Failure to provide required trainings. Lack of awareness of training requirements.
Member Development	Provide members with a well- rounded service experience, including leadership, skill-building, and networking opportunities.	Upon request, opportunities for leadership, skill-building and networking are available.	Members not encouraged with expanded opportunity in the areas of skill-building, leadership and networking.
Team Development	Effectively integrate teambuilding strategies into program training activities to foster team cohesiveness; anticipates and addresses the stages of member development.	Recognize team dynamics and emerging patterns of behavior; explore facilitation of activities to foster team cohesiveness.	Limited recognition of team dynamics; reactive.
Member Reflection	Lead reflective activities for members designed to deepen civic engagement and add meaning to the service experience.	Understand the strong benefits of reflection on member retention and satisfaction, working to develop reflection program.	Limited understanding and awareness of member reflection.
Effective Training Practices	Utilize a variety of trainers with subject matter expertise to provide relevant and timely information presented using adult learning tactics.	Program staff provide most trainings. Utilize outside trainers only for technical trainings, such as CPR or disaster preparedness.	Training covers the basic information but is not engaging. Program director provides all trainings.
Continuous Improvement	Member feedback is actively sought following each training and throughout the year to improve training and member experience. Program utilizes input to develop new training topics, methods or trainers.	Member feedback is informally sought by the program director on an ad hoc basis.	Feedback is not collected or considered to improve trainings.
Member Supervision	Work proactively to ensure members have proper support at their member service sites. Train site supervisors as necessary.	Members are informed about how to report problems with supervisors.	No plan in place to monitor quality of supervision or to receive or respond to member feedback on supervisors.

Financial Management		Actively participate in managing the budget of the program. Work cooperatively with financial and leadership staff to develop practices that effectively plan for and manage program funds and provide for accurate, complete and current documentation of the financial status of the AmeriCorps program. Adhere to the proposed budget, analyze and justify budget variances and monitor reports for accuracy.		
QUALITY INDICATOR	STRONG (PHASE II)	EMERGING (PHASE I)	STRUGGLING	
Accounting Knowledge	Strong understanding of budget and accounting terminology and their applications to the AmeriCorps program. Able to identify and interpret federal policies governing effective financial management	Identify all costs associated with the grant. Able to locate the relevant financial guidance, resources and references.	Limited knowledge of financial terminology or applications.	
Budget Development	Collaborate with program leadership to develop and implement budget; design budget to maximize resources in support of a fully compliant AmeriCorps project.	Aware of the program's approved budget. Approved budget includes all indirect and direct costs and VF and CNCS required components.	Limited knowledge of or participation in budget development. Unable to identify VF and CNCS budget requirements.	
Manages Program Expenditures	Fully engage with expenditure tracking throughout the process from approval to payment. Aware of financial standing of AmeriCorps budget.	Aware of program expenditure amounts and disbursement and tracking process.	Lack of awareness of expenditures. Limited involvement with program expenditure management.	
Monitoring Budget	In partnership with fiscal officer, reconcile budget and claims on a regular basis. Develop options for maximizing resources within federal requirements. Identify errors and variances, notify VF and adjust.	Receive reconciliation report from the fiscal officer. Budget amendments within approved budget. Limited communication with fiscal officer.	Review budget report. Limited ability to monitor and adjust the budget.	
Financial Reports	Work collaboratively with financial personnel to submit accurate and timely financial reports with complete support documentation (PER). Understand financial reports and effectively communicate the information to other program officials and community partners.	Developing understanding of financial reporting requirements, including required reports and deadlines.	Limited knowledge of financial reporting requirements. Lack of collaboration with financial personnel on financial reporting.	

Sustainability	Develop financial and non-financial support including, but not limited to, creating a sustainability plan, identifying potential sources of funds, developing funding and partnership proposals, presenting requests for assistance and securing adequate cash and in-kind match.		
QUALITY INDICATOR	STRONG (PHASE II)	EMERGING (PHASE I)	STRUGGLING
Sustainability Plan	Successful integration of an overall sustainability plan with diversified resources and defined systems in place.	Define basic elements that sustain the program, such as financial resources, program resources, and community support.	Limited knowledge or understanding of the value of a sustainability plan.
Programmatic Resource Identification	Successfully secure and utilize a variety of program resources necessary for effective program management.	Identify the programmatic resources necessary for effective programming.	Limited knowledge of programmatic resources (training, materials, supplies, etc.).
Financial Resource Identification	Successfully leverage diversified funding (individually or in conjunction with other agency staff).	Identify potential funding sources and develop a plan for requesting funds.	Limited knowledge of fund development practices.
Partnership Building and Collaboration	Maintain relationships that are consistent and mutually beneficial.	Identify potential partners and define goals for collaborations.	Limited knowledge of partnership development.
Public Relations and Communications Strategy	Successfully utilize a variety of communications strategies to increase public awareness and knowledge, resulting in community support.	Identify target audiences, develop appropriate messaging/branding and create a communication strategy.	Lack of knowledge of marketing and public relations practices. No plan for communications about the program.
Volunteer Management	Service of recurring volunteers supplements the intervention by members and the mission of the agency. Volunteers are able to take on leadership roles.	Community volunteers engaged in service days, one-time opportunities, or otherwise tangential roles.	Limited volunteer involvement. Role of volunteers in sustainability not understood.
Cultivation of Board & Leadership Support	Board and leadership understand the program and provide funding and support. Program has clear connection to mission and is seen as integral to achieving organizational goals.	Program is seen as an “add-on” and is not integrated into the organizational structure or limitedly connected to mission.	Program is not connected to mission and is not viewed as a priority by board or leadership.

Professional Development	Plan and participate in skill and knowledge-building educational opportunities that promote personal and professional growth. Opportunities should be related to issues that impact the program, broader community needs, evolving national priorities and the competencies outlined in this document.		
QUALITY INDICATOR	STRONG (PHASE II)	EMERGING (PHASE I)	STRUGGLING
Personal and Professional Development Plan	Attend and lead trainings and research best practices aligned with a professional development plan; effectively transfer skills to others; review plan annually to determine necessary revisions.	Explore resources and training opportunities to build skill set; create a plan for professional growth; ask for assistance.	Limited knowledge of own personal and professional development needs and how to develop a plan to address needs.
Knowledge of National Service	Comprehensive knowledge of national service (i.e. streams of service, provisions, regulations, guidance, program models, etc.); consistently apply knowledge to strengthen program. Connect with other national service programs.	Explore national service and identifies future training needs. Ask questions when unsure of application of policy. Plan to outreach to other national service programs.	Limited knowledge of national service. Has not familiarized themselves with the guiding documents of national service. Unaware of other national service programs in the area or doing similar activities.
VF Trainings	Staff are regular and active participants in VF-sponsored training opportunities. Brings personal knowledge and shares information with others.	Limited participation by staff in VF-sponsored trainings. Completes annual training survey.	Little or no participation by staff and members in VF-sponsored training opportunities.
Disability Inclusion	Recognize member performance issues related to undisclosed disability and provides appropriate resolution. Well versed in navigating disability benefits information as they relate to AmeriCorps benefits. All phase one items are routine.	Members are offered accommodations as required by law and they are provided upon request. All sites are reviewed for accessibility.	Unfamiliar with inclusive requirements of grantees. Program issues related to disability are present.
CNCS-Sponsored Trainings & Resources	Active and regular participation in CNCS-sponsored trainings and review of CNCS resource materials. Apply personal knowledge and shares information.	Explore CNCS-sponsored trainings and resources and reviews materials on an as-needed basis.	Limited knowledge of CNCS trainings and resources.
Program Director Calls	Regular participation in the PD calls by listening, sharing and applying information. Use VF trainings to full benefit, including understanding the message, responding to inquiries and applying information to program.	Occasionally read or respond to the bi-monthly newsletter. Listens to the PD calls.	Does not participate in calls and does not RSVP. Fails to read or respond to AmeriCorps updates sent out by VF.

Leadership and Public Policy	Cultivate leaders and champions within AmeriCorps and the national service network. Maintain a working knowledge of federal and state legislation, national governing policy, and policy trends that affect the implementation of national service programs. Support Volunteer Florida in promoting AmeriCorps, the national service movement, and volunteerism.		
QUALITY INDICATOR	STRONG (PHASE II)	EMERGING (PHASE I)	STRUGGLING
Best Practices	Identify and utilize evidence-based approaches and best practices from the field; document best practices and shares with others. Serve as a leader/mentor to new programs.	Explore and identify best practices from the field and consider how these practices may be applied.	Limited knowledge of best practices and how to document and apply them.
Champion/Leader Development	Successfully cultivate champions and other leaders who understand the value of national service and communicate this with others; evaluate identified champions/leaders on an on-going basis to assess the extent and quality of messaging.	Explore leadership development strategies and identify potential champions/leaders to communicate the value of national service.	Limited knowledge of leadership development strategies and human resources available in the community.
Public Policy	Keep informed of proposed legislation and regulation changes in national service or AmeriCorps spheres. Update program model proactively, and communicate with members and service sites about policy changes that impact service provision.	Adjust program upon advisement from VF or national organization after public policy changes.	Limited knowledge of policy-making process and the impact of policies on program operations or member service.
Support for Volunteer Florida initiatives	Share data, photos, social media posts, and great stories to be used in annual or commission reports. Invite VF leadership, commissioners, or community leaders to program events. Actively utilize Volunteer Connect to promote volunteer opportunities.	Share data to be used in annual or commission reports. Created an account on Volunteer Connect.	Share incomplete impact data or does not provide it in a timely fashion. Program does not use Volunteer Connect.
Impact Data	Successfully integrate and maintain a stakeholder education plan that includes dissemination of impact data to local VIPs; utilize messages to cultivate champions and increase knowledge of program. Share best practices with other AmeriCorps programs.	Research and develop stakeholder education plan that incorporates the dissemination of impact data to local VIPs.	Limited knowledge of how to educate stakeholders and the process for disseminating impact data.