Policies & Procedures Manual
2005-2006

NATIONAL COUNCIL OF LA RAZA
AMERICORPS PROGRAM

Washington, DC
September, 2005

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Introduction

This NCLR Policies and Procedures Manual was produced by a consultant for CHP International, a training and technical assistance provider of the Corporation for National and Community Service (CNCS) in conjunction with the CNCS Program Officer and the National Council of La Raza (NCLR) AmeriCorps Program Director.

This version of the manual for program year 2005-06 has been revised and consolidates policies and procedures that govern the program and fiscal management of the NCLR AmeriCorps Program and updates a variety of resource and reference materials to assist NCLR operating sites in fulfilling their many responsibilities under the AmeriCorps Program.

The materials in this manual are intended to assist operating sites in four major ways:

♦ Providing an easily accessible overview of operating sites' responsibilities and their role in managing the AmeriCorps Program and supporting AmeriCorps members

♦ Providing reference materials with definitive information on program regulations, requirements, and administrative guidance

♦ Providing resources to assist operating sites in reviewing their own efforts in member development, in supporting their programs, and in sustaining and enhancing the vision of the AmeriCorps Program

♦ Providing practical guidance on monitoring and assessing program grantees' performance

The manual is not intended to be completely comprehensive, but it should serve as a primary resource document and reference source. Operating sites should supplement the use of this manual with the three other resource documents provided through the AmeriCorps Program:

♦ **AmeriCorps Provisions**
♦ **Walker & Company Fiscal Management Training Manual**
♦ **Online WBRS Help Manual**

The manual identifies and highlights those topics that are of particular interest or concern to the National Council of La Raza and provides suggested guidance, information, or standards in key financial, management, and compliance areas. At the same time, this manual is meant to be a living, evolving resource, updated based on suggestions from NCLR AmeriCorps operating site program directors, fiscal managers, AmeriCorps staff, and members as to how to make it more useful, and incorporating promising approaches to deal with emerging issues and topics not dealt with in previous editions.

National Council of La Raza's AmeriCorps LENS Program Calendar

	2005-2006	
FIRST	**QUARTER**	
SEPTEMBER		
	Conduct AmeriCorps Member PreService Orientation.	Program Directors
	Conduct Program Kick Off/Swearing In Ceremony. Submit any group photo to NCLR.	Program Directors
	Create Civic Engagement Timeline and schedule trainings	Program Directors
9/9/2005	Signed Sub grant agreements due back to NCLR	Sites
9/10/2005	Due Date for final entry of time logs, PER's, FSR, and APR in WBRS for 04-05 grant Year	Program Directors
9/11/2005	**One Day's Pay Day of National Service**	**Program Directors**
9/15/2005	Program Director's Conference Call-Third Thursday of the month	Program Directors
9/15/2005	Corporation Financial Report due	NCLR Finance Department
SEPTEMBER	Establish Planning committee for Los Angeles NCLR Conference Community Service Project	Staff
	Create Site Visit Schedule and Calendar	NCLR
OCTOBER		
10/5/2005	September PER due in WBRS	Financial Managers
10/10/2005	September Time logs due in WBRS	Program Directors
10/12-14/2005	Program Director's Training at MAAC Project-San Diego, CA	Program Directors
10/15/2005	Corporation Financial Report due	NCLR Finance Department
10/21/2005	Program Directors Call	
10/22/2005	**MAKE A DIFFERENCE DAY COMMUNITY SERVICE DAY**	**Program Directors**
	Review Final Progress Reports	NCLR
	Prepare GPR for 04/05 year in WBRS	NCLR
	Prepare AmeriCorps Continuation RFP Instructions and Application Packet	NCLR
	Distribute AmeriCorps RFP	Staff
NOVEMBER		
11/5/2005	October PER due in WBRS	Financial Manager

11/10/2005	October Time logs due in WBRS	Program Directors
11/15/2005	Corporation Financial Report Due	NCLR Finance Department
11/17/2005	Program Directors Call	Program Directors
11/19/2005	**National Family Volunteer Day**	**Sites**
NOVEMBER	Begin Desk Audits	NCLR
DECEMBER		
12/5/2005	November PER due in WBRS	Financial Managers
12/10/2005	November time logs due in WBRS	Program Directors
12/15/2005	Corporation Financial Report Due	NCLR Finance Department
12/22/2005	Program Director's call	Program Directors
12/15/2005	GPR for 2004-2005 due in WBRS	NCLR
SECOND	**QUARTER**	
JANUARY		
1/5/2006	December PER due in WBRS	Financial Managers
1/10/2006	December Time logs due in WBRS	Program Directors
1/10/2006	**First Quarter FRS and APR due in WBRS**	**Program Directors**
1/15/2006	**Corporation Financial Report Due**	**NCLR Finance Department**
JANUARY	MLK Day of Service	sites
19-Jan	Program Director's Call	Program Directors
FEBRUARY		
2/5/2006	**January PER due in WBRS**	**Program Directors**
2/10/2006	January Time Logs due in WBRS	Bryan
2/15/2006	Corporation Financial Report Due	NCLR Finance Department
2/17/2006	Program Directors Call	Program Director
MARCH		
	Member MID TERM PERFORMANCE DUE	Site Supervisors/Program Directors
3/5/2006	**February PER due in WBRS**	**Program Directors**
3/7/2006	**Capital Awards-Washington DC**	
3/10/2006	February time logs due in WBRS	Program Directors
3/15/2006	Corporation Financial Report Due	NCLR Finance Department
3/16/2006	**Absolutely Incredible Kid Day**	**Sites**
3/16/2006	Program Directors Call	Program Director
THIRD	**QUARTER**	
APRIL		

Date	Task	Responsible
4/5/2006	March PER due in WBRS	Financial Managers
4/5/2006	March Time logs due in WBRS	Program Direcotrs
4/10/2006	Second Quarter APR and FSR's Due in WBRS	Financial Managers
4/15/2006	Corporation Financial Report Due	NCLR Finance Department
4/20/2006	Program Directors Call	Program Directors
4/21/06-4/23/06	National Youth Service Day Civic Engagement Community Service Project Required	All Sites
4/23/056- 4/29/06	NATIONAL VOLUNTEER WEEK	Site
APRIL	Desk Audits	NCLR
MAY		
5-May-06	April PER due in WBRS	Financial Managers
5/6/2006	Join Hands Day	Sites
5/10/2006	April time logs due in WBRS	Program Directors
5/15/2006	Corporation Financial Report Due	NCLR Finance Department
5/18/2006	Program Directors call	Program Directors
JUNE		
6/5/2006	May PER due in WBRS	Financial Managers
6/10/2006	May Time logs due in WBRS	Program Directors
6/15/2006	Program Directors call	Program Directors
6/15/2006	Corporation Financial Report Due	NCLR Finance Department
FOURTH	QUARTER	
JULY		
7/5/2006	June PER due in WBRS	Financial Managers
7/10/2006	June Time logs due in WBRS	Program Directors
7/10/2006	Third Quarter APR and FSR due in WBRS	Financial Managers and Program Dire
7/7/2006	NCLR Community Service Event**Raul Yzaguirre Day of Service	All Sites
7/08/06-7/10/06	NCLR Annual Conference Los Angeles, CA	Everyone and their sister
7/15/2006	Corporation Financial Report Due	NCLR Finance Department
7/20/2006	Program Directors Call	Program Directors
AUGUST		
8/5/2006	July PER due in WBRS	Financial Manager
8/10/2006	July Time logs due in WBRS	Program Directors
8/15/2006	Corporation Financial Report Due	NCLR Finance Department
8/17/2006	Program Directors Call	Program Directors
8/31/2006	Program Ends-Closing Ceremonies	All Sites
AUGUST	Plan PreService Orientation Agenda and arrange for guest speakers/trainers	Program Directors
	Prepare and distribute Subgrant Agreements for 06-07 program year	NCLR

NATIONAL SERVICE DAYS

Seasons of Service

Also known as the **national days of service**, the Seasons of Service is an effort to encourage and mobilize people across the country to become involved in public service. Various national community service days have been created for the purpose of presenting continuous opportunities every season for people to volunteer their time and talents to service projects and activities.

Martin Luther King, Jr. Day of Service, January: Dr. King said, "Everybody can be great because everybody can serve." On the federal holiday celebrating his birthday, Americans turn their "day off" into a "day on" by serving in their communities. Visit www.mlkday.org for more information.

National Volunteer Week, April: "Celebrate Volunteers!" is the theme for the annual National Volunteer Week. National Volunteer Week is a time to recognize and celebrate the efforts of volunteers at the local, state, and national levels. For more information, visit: www.pointsoflight.org/programs/programs_nvwintroa.htm

National Youth Service Day, April: This is an annual public education campaign, highlighting the efforts of young people in their communities, encouraging more young people to become involved in volunteering, and promoting the benefits of service to the American people. For more information visit: www.ysa.org

Join Hands Day, May: This day promotes adult-youth relationships through neighborhood volunteering and provides opportunities where youth and adults play joint leadership roles, planning and participating in volunteer service projects to strengthen their own communities. For more information visit: www.joinhandsday.org.

One Day's Pay, September: This event encourages people everywhere to set aside time every September 11 to help others in need – in any fashion they deem appropriate – in honor of those who lost their lives as a result of the terrorist attacks against America. For more information visit: www.pointsoflight.org**.**

Kids Care Week, October: Kids Care Week is dedicated to recognizing the pwer of kids to reach out and help othrs in their local community. During this week, young people focus their compassion on a specific social issue through a service project**.**

Make a Difference Day, October: Held each year on the fourth Saturday in October, Make a Difference Day is a chance for communities to come together to create change and make a difference in the lives of their residents. For more information, visit: www.makeadifferenceday.com

National Family Volunteer Day, November: This day is a call for families in cities all across America to work together on tasks that will benefit their communities. The spotlight on families is designed to showcase the benefits of families working together, and to encourage those who haven't yet made the commitment to volunteer as a family to begin doing so. For more information, visit: www.pointsoflight.org/familymatters/fm_about.cfm

AmeriCorps

Corporation for
NATIONAL &
COMMUNITY
SERVICE ★★★

The Corporation for National and Community Service provides opportunities for Americans of all ages and backgrounds to serve their communities and country through three programs: Senior Corps, AmeriCorps, and Learn and Serve America. Members and volunteers serve with national and community nonprofit organizations, faith-based groups, schools, and local agencies to help meet community needs in education, the environment, public safety, homeland security, and other critical areas. The Corporation is part of USA Freedom Corps, a White House initiative to foster a culture of citizenship, service, and responsibility, and help all Americans answer the President's Call to Service.

PRESIDENT'S CALL TO SERVICE

President Bush created USA Freedom Corps to coordinate citizen volunteer efforts both domestically and abroad. As part of that initiative, the President called on all Americans to devote the equivalent of at least two years of their lives—4,000 hours—to service and volunteerism. National and community service programs are one way to answer the President's call. Senior Corps taps the skills, talents, and experience of older Americans to help solve pressing social problems, while AmeriCorps gives citizens the opportunity to perform intensive service over an uninterrupted period. Learn and Serve America, which links classroom studies with service in the community, is an important and effective way of instilling the habits of good citizenship and fostering a lifelong ethic of service among young Americans.

SENIOR CORPS

Senior Corps taps the skills, talents, and experience of more than 500,000 Americans age 55 and older to meet a wide range of community challenges through three programs: RSVP, Foster Grandparents, and Senior Companions. RSVP volunteers conduct safety patrols for local police departments, participate in environmental projects, provide intensive educational services to children and adults, and respond to natural disasters, among other activities. Foster Grandparents serve one-on-one as tutors and mentors to young people with special needs. Senior Companions help homebound seniors and other adults maintain independence in their own homes.

AMERICORPS

Fifty thousand Americans are serving their communities 20 to 40 hours a week through AmeriCorps. Most AmeriCorps members are selected by and serve with

(Continued)

1201 New York Avenue, NW ★ Washington, DC 20525 ★ 202-606-5000
www.nationalservice.org

USA
Freedom Corps
The President's Call to Service

local and national nonprofit organizations such as Habitat for Humanity, the American Red Cross, City Year, Teach for America, and Boys and Girls Clubs of America, as well as with a host of smaller community organizations, both secular and faith-based. In exchange for a year of service, AmeriCorps members earn an education award of $4,725 that can be used to pay for college or graduate school, or to pay back qualified student loans. About half the members also receive a modest living allowance of $9,300 and health benefits.

AmeriCorps operates in a decentralized manner that gives a significant amount of responsibility to states and local nonprofit groups. Roughly three-quarters of all AmeriCorps grant funding goes to Governor-appointed state service commissions, which award grants to nonprofit groups to respond to local needs. Most of the remainder of the grant funding is distributed by the Corporation directly to multi-state and national organizations through a competitive grants process.

AmeriCorps also administers two programs that operate somewhat differently but are still designed to assist and increase the effectiveness of nonprofit organizations and public agencies. AmeriCorps*VISTA, which has approximately 6,000 members, focuses on eradicating poverty and helping to meet the needs of people living in low-income communities nationwide. AmeriCorps*NCCC (National Civilian Community Corps) is a residential

program for more than 1,200 members ages 18 to 24. Based on a military model, it sends members in teams of 10 to 14 to help nonprofit groups provide disaster relief, preserve the environment, build homes for low-income families, tutor children, and meet other challenges. Because members are trained in CPR, first aid, and mass care and can be assigned to new duties on short notice, they are particularly well-suited to meeting the emerging homeland security needs of the nation.

LEARN AND SERVE AMERICA

Learn and Serve America provides grants to schools, colleges, and nonprofit groups to support efforts to engage students in community service linked to academic achievement and the development of civic skills. This type of learning, called service-learning, improves communities while preparing young people for a lifetime of responsible citizenship. In addition to providing grants, Learn and Serve America serves as a resource on service and service-learning to teachers, faculty members, schools, and community groups.

MORE INFORMATION

To learn more about the Corporation or any of its programs, visit *www.nationalservice.org* or call 202-606-5000 or TTY 202-565-2799. To learn more about the USA Freedom Corps and the President's Call to Service, visit *www.usafreedomcorps.gov* or call 877-USA-CORPS (877-872-2677).

AmeriCorps

AmeriCorps engages 50,000 Americans age 17 and older each year in intensive service to meet community needs in education, the environment, public safety, homeland security, and other areas. Members serve with national nonprofit organizations like Habitat for Humanity, the American Red Cross, and Teach for America, as well as with hundreds of smaller community organizations, both secular and faith-based. Other members serve with AmeriCorps*NCCC (National Civilian Community Corps), a team-based residential program for adults ages 18 to 24, or in low-income communities with AmeriCorps*VISTA. In exchange for a year of service, AmeriCorps members earn an education award that can be used to pay for college or to pay back qualified student loans.

OVERVIEW

Since 1994, more than 250,000 men and women have served in AmeriCorps, providing needed assistance to millions of Americans. AmeriCorps provides trained, dedicated people to help nonprofit groups, both secular and faith-based. Members tutor and mentor youth, build affordable housing, teach computer skills, clean parks and streams, run after-school programs, help communities respond to disasters, and recruit and manage traditional volunteers. At the request of President Bush, AmeriCorps has expanded its work to include projects directly related to homeland security.

AMERICORPS*STATE AND NATIONAL

More than three-quarters of AmeriCorps grant funding goes to Governor-appointed state service commissions, which in turn award and monitor grants to hundreds of nonprofit groups and agencies. The other quarter goes to national nonprofits that operate in more than one state.

The organizations that receive grants are responsible for recruiting, selecting, and supervising AmeriCorps members. AmeriCorps grantees include national groups such as the U.S. Veterans Initiative, National Council of La Raza, Catholic Network of Volunteer Service, and Boys and Girls Clubs of America, as well as hundreds of smaller faith-based and local community organizations.

AMERICORPS*VISTA

For more than 35 years, AmeriCorps*VISTA members have helped impoverished individuals and communities attain self-sufficiency. Members serve full time for a year with nonprofit groups, public agencies, and faith-based organizations throughout the country, working to fight illiteracy, improve health services, create and expand businesses, increase housing opportunities, and bridge the digital divide.

Approximately 6,000 AmeriCorps*VISTA members serve in more than 1,100 local programs; nearly 15 percent of

FACT SHEET

AmeriCorps*VISTA members are assigned to projects that support the work of faith-based organizations.

AMERICORPS*NCCC

AmeriCorps*NCCC (National Civilian Community Corps) is a 10-month, team-based, full-time residential program for men and women between the ages of 18 and 24. It combines the best practices of civilian service with the best aspects of military service, including leadership training and team building. Members serve in diverse teams of 10 to 14 individuals. Priority is given to projects in homeland security and disaster relief. Teams are based at five campuses across the country and are assigned to projects in their respective regions. Approximately 1,200 members serve in AmeriCorps*NCCC.

ELIGIBILITY AND BENEFITS

AmeriCorps is open to U.S. citizens, nationals, or lawful permanent resident aliens age 17 and older. Members serve full or part time over a 10- to 12-month period. Upon successful completion of their service, members receive an education award of $4,725 to pay for college, graduate school, or to pay back qualified student loans. During their service, members receive health insurance, training, and student loan deferment. About half of the members also receive a modest annual living allowance of about $9,300. Members who serve part time receive a partial education award.

CORPORATION FOR NATIONAL AND COMMUNITY SERVICE

AmeriCorps is administered by the Corporation for National and Community Service, which also oversees Senior Corps and Learn and Serve America. Together, the programs of the Corporation provide opportunities for Americans of all ages and backgrounds to serve their communities and country.

USA FREEDOM CORPS

The Corporation and its programs are part of USA Freedom Corps, a White House initiative to foster a culture of citizenship, service, and responsibility, and help all Americans answer the President's Call to Service.

MORE INFORMATION

To learn more about AmeriCorps, visit *www.americorps.org* or call 800-942-2677 or TTY 800-833-3722.

January 2003

Communication with State Commissions and NCLR

State Commissions:

It is the policy of NCLR to advise state commissions of our presence in those states where we host AmeriCorps.

The NCLR AmeriCorps Program Director sends a letter to each state commission which introduces AmeriCorps and our Mission Statement. The letter also includes the operating site(s) in those states with the name of the site director and his/her contact information. It is expected that each site director will contact the state commission and introduce him/herself and offer the state commission any assistance, such as training in youth volunteerism, and request to be added to the commission's mailing list. Additionally, state commissions often have a variety of training and technical assistance opportunities available throughout the year.

Conference Calls:

Monthly conference calls with the site directors will be set up by the NCLR AmeriCorps Program Director. Instructions for these calls and the agenda will be sent out in advance with an opportunity for site directors to add any issues to the agenda. Each site director is expected to make every possible effort to participate in these calls and confirm participation or the participation of a representative.

LIST OF STATE COMMISSIONS

For information about state commissions not listed on this page refer to:
http://www.nationalservice.org/about/family/commissions.html#IL

Arizona Governor's Commission on Service and Volunteerism
Lauren Kielsmeier
Executive Director
Tammy Paz-Combs, Director, Commission on Service and Volunteerism
1700 West Washington, Suite 101
Phoenix, AZ 85007-2806
phone: 602/542-3489
fax: 602/542-3423
e-mail: lkielsmeier@az.gov
website: www.volunteerarizona.org

California Service Corps
Marie Moretti
1110 K Street, Suite 210
Sacramento, CA 95814 - 3905
Phone: 916-323-7646
Fax: 916-323-3227
moretti@csc.ca.gov
www.csc.ca.gov

IDHS/Illinois Commission on Volunteerism & Community Service
Asta Ardickas Bonheyo, Executive Director
535 W. Jefferson, 3rd Flr.
Springfield, Il 62702
Phone: 217-278-5663
Fax: 217-557-0515
aardicka@idph.state.il.us
dhshp68@dhs.state.il.us

New Mexico Commission for Community Volunteerism
Greg Williams, Executive Director
Children, Youth and Family Department
3401 Pan American Freeway, NE
Albuquerque, NM 87107-4785
Phone: 505-841-4841
Fax: 505-841-4839
gwebb@cyfd.state.nm.us
www.newmexserve.org

PennSERVE: The Governor's Office of Citizen Service
Karen Kasky
Executive Director
1306 Labor and Industry Building, 13th Floor
7th and Forster Streets
Harrisburg, PA 17120-0019
phone: 717/787-1971
fax: 717/705-4215
kkaskey@state.pa.us
 pennserve@state.pa.us
www.dli.state.pa.us/landi/cwp/view.asp?a=143&Q=59048

One Star National Service, Inc.
Russell Smith, Executive Director
816 Congress, Suite 900
Austin, TX 78701-2471
Phone: 512-473-2140
Fax: 512-473-8228
russel2onestarfoundation.org
www.onestarfoundation.org

SAMPLE LETTER TO STATE COMMISSION

September, 2005

«Executive Director»
«StateCommission»
Address
City, State, Zip

Dear «Executive Director»:

The National Council of La Raza (NCLR) is a private, non-profit, nonpartisan organization established in 1968 to reduce poverty and discrimination and improve life opportunities for Hispanic Americans. NCLR would like to take this opportunity to inform your organization of an AmeriCorps Direct site in «City, State» at *«Community-Based Organization». «Community-Based Organization»* is part of NCLR's AmeriCorps*National Direct program that currently funds ten operating sites in six states.

NCLR is headquartered in Washington D.C. The National Program Director, Geraldine Schafer, and the Assistant Director, Rogelio Quintanar, are housed at the D.C. office.   The Director administers the progam and the Assistant Director monitors daily site operations and provides training and technical assistance to this project.

Each of NCLR's ten operating sites offers a variety of services to their communities including: education, workforce development programs; public health centers; Head Start centers and other activities for children and youth; financial services information; housing counseling; church-based ministries; social, relief, and refugee services; and legal/immigration services.

NCLR's AmeriCorps program focuses on educational attainment and workforce development.   AmeriCorps members tutor and mentor in school as well as in after-school programs that address the educational needs of children. Members assigned to career resource centers and/or One Stops provide job skills training to low-income Latino youth and adults.

A profile on *«Community-Based Organization»* that details what AmeriCorps members at the site will be doing and contacts for the site. Please place the National Council of La Raza and *«Community-Based Organization»* on your distribution list. Enclosed is the contact information for NCLR AmeriCorps staff and the operating site.

NCLR and *«Community-Based Organization»* are eager to establish a good working relationship with the state commission and become a participating member of the state commission's network.

NCLR looks forward to working with you throughout the year.

Sincerely,

Geraldine Schafer
NCLR AmeriCorps*National Direct
National Program Director

Cc: Program Director, Operating Site

Attachment

NCLR Background

NCLR PROGRAMS AND RESOURCES

EDUCATION

NCLR's education program efforts are carried out through its Center for Community Educational Excellence (C^2E^2), which underwent a restructuring in 2002 to focus its activities and improve its responsiveness to affiliates. There are now four main "teams" under C^2E^2 including: Educational Leadership and Administration (impacting educational institutions), Teaching and Learning (impacting classrooms), Training and Professional Development (impacting administrators, teachers, and program staff), and Research and Evaluation (evaluating and feeding data back into the system). In the area of education policy, NCLR works to ensure that Latino children have access to a quality education that meets their needs.

HEALTH

Since 1988, NCLR has been contributing to the health and well-being of Latino communities nationwide through its Institute for Hispanic Health (IHH), formerly known as the Center for Health Promotion (CHP). IHH has developed innovative and successful projects in the areas of HIV, children's health, immunization, and cardiovascular disease, among many other health conditions. Most recently, NCLR has been working diligently on projects in the areas of chronic diseases, infectious diseases, and health insurance.

ASSETS/INVESTMENTS

NCLR's work in the area of assets/investment is carried out through the NCLR Homeownership Network (NHN) and community development efforts in conjunction with the Raza Development Fund (RDF). Currently, 35 community-based housing counseling organizations are members of NHN. That number is expected to increase to 45 organizations in 2003. This program is a partnership between NCLR and several investors including the U.S. Department of Housing and Urban Development, Freddie Mac Corporation, and Fannie Mae Corporation, and several private mortgage lenders such as Wells Fargo Mortgage. In the area of community development, NCLR provides technical assistance on real estate projects to affiliates and originates RDF loan requests.

WORKFORCE DEVELOPMENT

NCLR's workforce development system increases the capacity and quality of performance of Latino community-based organizations providing job readiness, referral, placement, training, basic education, and other services for Latinos in the workforce. Building on the Signature Approach to Workforce Development, the Workforce Development team has been developing partnerships with NCLR Corporate Board of Advisors companies - PepsiCo, Bank of America, Wal-Mart, and ChevronTexaco - and other leading national corporations, including Sears and Home Depot. Various demonstration projects implementing and refining the approach are underway.

AFFILIATE RELATIONS

NCLR's Affiliate Member Services (AMS) focuses on maintaining and enhancing the NCLR/Affiliate relationship through communication of NCLR and affiliate resources, facilitation of partnerships between affiliates and NCLR's programmatic components, and brokering resources to benefit affiliates beyond those of NCLR. AMS sponsors and coordinates Regional Affiliate Caucuses in order to help foster collaborative action among NCLR's affiliate network. Each year, NCLR bestows its Affiliate of the Year Award upon one outstanding affiliate for the commitment it shares with NCLR to reduce poverty and discrimination and improve life opportunities for Hispanic Americans.

EMERGING LATINO COMMUNITIES

The Emerging Latino Communities (ELC) Initiative strives to help new Latino communities that have little power or influence and face challenges to obtaining social and economic opportunities to become fully integrated into American society. The emergence of new Hispanic populations has created a significant need for policy advocacy, social services, and education. New Latino communities face a multitude of issues in adapting to their new environment, including English-language instruction, housing, employment and training, employment rights instruction, naturalization training, legal services, and counseling. ELC builds the capacity of these newly-formed Hispanic organizations so that they may continue to serve as reliable sources of leadership, education, and resources for their local communities.

ECONOMIC MOBILITY

NCLR addresses the economic and employment issues that affect Latino workers and their families through its Economic Mobility Initiative (EMI). This past year, NCLR engaged in public policy, research, and community-level activities on issues such as welfare reform, jobs and employment, savings, asset-building, and tax policy. A key component of EMI, the Asset Development Initiative, addresses the financial and wealth-building challenges facing Latino families.

IMMIGRATION/CIVIL RIGHTS

NCLR has been advocating for fair and effective immigration policies as well as for civil rights laws and their vigorous enforcement for over two decades. NCLR works to ensure that laws affecting Hispanic Americans in these areas are fairly and equitably enforced. NCLR continues to address the fundamental inequities in immigration law, while focusing on meeting the service and advocacy needs of the Latino immigrant population. In the area of immigration policy, NCLR was forced in 2002 to adopt a posture of extreme vigilance as immigrants came under close scrutiny by enforcement officials focused on security. NCLR's goal is to minimize the harm that might come to Latino communities as a result of these changes, and to ensure that the nation lives up to its values as a nation of immigrants, committed to equal justice for all.

FIELD ADVOCACY

NCLR's field advocacy activities add a state and local dimension to NCLR's policy analysis and advocacy work while seeking to strengthen the nonpartisan foundation for increased Latino participation in the political process. NCLR's public policy expertise at the federal level has provided fertile ground for collaboration with state and local groups engaged in education, health, economic mobility, civil rights, and immigration issues. NCLR has lent assistance to a large number of state and local groups to strengthen their role as promoters of grassroots leadership and agents of social change. In addition, NCLR selected Texas and California, the two states with the largest Latino populations and with the potential to set policy trends nationwide on issues affecting Latinos, to implement a staff-based field advocacy model. A specific focus of NCLR's field advocacy efforts is to produce measurable and sustainable increases in Latino participation through 2004. The Latino Empowerment and Advocacy Project (LEAP) was launched in 2002 to maximize nonpartisan, repeated voter contact and education through modern campaign and outreach strategies. LEAP will work to expand its network of community-based organizations, link naturalization with voter registration, connect newly-registered voters with voter education and Get-Out-The-Vote activities, and incorporate civic participation themes into high school, English-as-a-Second-Language (ESL), and naturalization curricula.

LEADERSHIP

NCLR's Center for Emerging Latino Leadership concentrates on organizing young people. There are over one million Latinos enrolled in U.S. colleges now who have the opportunities to develop leadership skills that are essential to securing a positive future. In addition to the Center, the NCLR AmeriCorps program is a national service initiative through which NCLR engages Latino youth in intensive community service to meet the critical needs of their respective communities, specifically regarding education, public safety, health, and the environment.

INTERNATIONAL PROJECTS

NCLR established itself as a powerful voice in the international arena with its conditional support of the North American Free Trade Agreement (NAFTA) in 1993. Since the passage of NAFTA, NCLR has remained active in international issues interacting with nonprofit organizations, institutional actors, and concerned groups based in Latin America, Canada, and Europe. NCLR's international activity is channeled mainly through the following initiatives:

SPECIAL EVENTS

NCLR's Strategic Communications Group develops and implements NCLR's special events including the Capital Awards, the ALMA Awards, and the NCLR Annual Conference, as well as NCLR's *ACCENT* magazine.

NCLR AmeriCorps Initiative

NCLR AMERICORPS INITIATIVE

The National Council of La Raza (NCLR) is a private, nonprofit, nonpartisan organization established in 1968 to reduce poverty and discrimination and improve life opportunities for Hispanic Americans. For fiscal year 2005-06, NCLR has ten affiliate organizations that were selected to participate as AmeriCorps Program operating sites for its "Latino Empowerment through National Service" (LENS) Project. These sites are located in seven states: Arizona, California, Illinois, Pennsylvania, New Mexico, and Texas.

NCLR operates an AmeriCorps Program funded by the Corporation for National and Community Service. The LENS project gives AmeriCorps members the opportunity to gain practical job experience by tutoring directly in the classroom and in after-school programs to help low-income Latinos enhance their educational performance in core curriculum topics such as reading, math, and science. Other members instruct Latino youth and adults in computer literacy, language proficiency, General Equivalency Degree (GED) exam preparation, and job-readiness skills.

NCLR is ready and willing to assist affiliates in their work with the AmeriCorps Program in effective program management and in building partnerships with others in the AmeriCorps network. Main features of the NCLR program include:

- **National Funding**. CNCS-funded NCLR AmeriCorps Program strives to increase awareness of AmeriCorps among NCLR affiliates and provide funding to affiliates where AmeriCorps members can serve to meet local community needs.

- **Headquarters and Regional Field Office Support**. The NCLR Service Delivery Model allows providing technical assistance to operating sites via the national program.

- **Collaboration with State Commissions**. State commissions provide support and resources to local AmeriCorps operating sites within their state. State commissions have the role of developing and communicating a statewide vision and ethic of service and promoting that vision throughout their state. This includes a variety of responsibilities related to promoting service and developing service programs and collaborative approaches in the state.

- **Participation in Nationwide AmeriCorps Events**. Also known as the **national days of service**, the Seasons of Service is an effort to encourage and mobilize people across the country to become involved in public service. Various national community service days have been created for the purpose of presenting continuous opportunities every season for people to volunteer their time and talents to service projects and activities.

- **Training and Technical Assistance**. NCLR has a yearly planning calendar of reporting deadlines, annual events, and training and technical assistance visits and conference calls. Annual training events are planned for operating site program directors and their staff to review program procedures, systems, and their effectiveness as well as regular site visits to monitor program and fiscal operations.

- **Resources and Publications**. AmeriCorps Program operating sites have access to both NCLR and AmeriCorps publications and resources. These include guides, program applications, forms, handbooks, links to training resources, legislation, and regulations. Through AmeriCorps, operating sites have access to the AmeriCorps Recruitment and Placement to advertise member positions available within their organizations.

- **Collaboration and Partnership Opportunities**. Operating sites have the opportunity to partner with other local AmeriCorps programs in the area. Through your involvement in the NCLR AmeriCorps Program, you will be able to access the volunteer and knowledge resources of other programs by initiating discussions to explore partnership opportunities. NCLR can play a facilitative role in the effort and provide you with outreach support.

- **Visibility**. Share information about your AmeriCorps Program with NCLR. NCLR includes your program information in NCLR annual reports, newsletters, and website. Inform others about the special events in your project and link up with other organizations with common interests and goals.

- **NCLR Annual Conference**. The NCLR Annual Conference held every year in July is a great place to reach other Latino community service professionals across the country. Each year, NCLR holds a two-or three-day technical training for program directors and their AmeriCorps staff members. Program directors can share their information and expertise with other participants in the NCLR AmeriCorps network and attend other Conference events such as Latino Expo USA; job, health, and housing fairs; as well as the numerous Conference workshops.

1. **Association House of Chicago**
   Miguel Palacio, Associate Director
   Angelica M. Gomez, Program Administrator
   Javier Santoyo, Financial Manager
   1116 N. Kedzie Ave.
   Chicago, IL 60651
   (773) 772-7170
   (773) 384-0560 fax
   mpalacio@associationhouse.org
   agomez@associationhouse.org
   jsantoyo@associationhouse.org

Association House of Chicago is a privately funded, not-for-profit social service agency that has been helping people in need since 1899. It is a comprehensive community service center serving the Hispanic communities of Chicago neighborhoods, promoting self-sufficiency among the families in the area. As one of the oldest and largest of the original settlement houses in the city, Association House serves thousands of families each year, offering counseling and educational vocational programs under the management of 200 caring staff members and a dedicated volunteer Board of Directors.

Association House AmeriCorps members will be assigned to programs that address literacy and job readiness. Members will serve as tutors in after school programs working with children and youth to provide homework help, reading and math assistance, and basic computer training. Members will also work with youth and adult job readiness programs to provide English and Spanish literacy, citizenship, GED and job skills training.

2. **Centro de Salud Familiar La Fe, Inc.**
   Salvador Balcorta, Executive Director
   Daniel Lara Program Director
   608 S. Saint Vrain St.
   El Paso, TX 79901-3007
   (915) 534-7979
   (915) 545-7190 (Division Administrator)
   balcorta@mail.htg.net
   ctcdl@mail.htg.net

Centro de Salud Familiar La Fe, Inc. is a non-profit health and human services organization that has served the US/Mexico border community of El Paso, Texas since 1968. La Fe is a federally qualified community health center with multiple sites that is committed to the well being of the community by providing quality health care and social services in one of the economically poorest neighborhoods in the nation. Ancillary services include a pharmacy, a diagnostic laboratory, radiology, referrals, patient transportation, translations, health education programs and social services.

AmeriCorps members will serve as teaching assistants during in-school and after-school programs to help increase students' English proficiency. Members will also serve as family literacy instructors to provide adult community members with GED and ESL instruction. La Fe Corps Members will also provide training to youth and adults on parenting skills, teen pregnancy, health preventative measures and leadership skills.

3.   **Instituto del Progreso Latino (IPL)**
Juan Salgado, Executive Director
Sara Villanueva, Program Director
Alma Rodríguez, Program Coordinator
Edison Urena, Fiscal Manager
2570 S. Blue Island Ave.
Chicago, IL 60608
(773) 890-0055 (Exec. Dir)
(773) 521-0055 (Prog. Dir)
(773) 890-1537 fax
juan@idpl.org
sara@idpl.org
alma@idpl.org
edison@idpl.org

Instituto del Progreso Latino promotes the full development of Latinos and their families with programs in education training, employment, and leadership. Based in Chicago, Illinois, Instituto del Progreso Latino was established in 1977 as an Alternative Adult Education high school, and now offers educational services to youth and adults.

AmeriCorps members will focus on job preparedness skills for adults providing orientation and guidance on services offered at IPL while engaging one-on-one with job seekers at four IPL neighborhood career resource centers, helping resident's access career and employment information on the Internet and develop resumes. Members will provide tutoring assistance to youth and adults in the areas of native language literacy, citizenship preparation, high school graduation and elementary school completion.

4.   **Luz Social Services, Inc.**
Ricardo Jasso, Executive Director
Felicia Granillo, Director of Administration/AmeriCorps Program Director
Esperanza Lumm, Program Director
2797 N. Introspect Drive
Tucson, AZ 85745
(520) 882-6216
(520) 882-9291 fax
rjasso@luzsocialservices.org
fgranillo@luzsocialservices.org
elumm@luzsocialservices.org

Luz Social Services provides culturally competent community-based prevention and education services for the Latino community in Tucson Arizona. Luz is a capacity builder for its community, providing technical assistance, guidance and support to build an infrastructure for learning, substance abuse prevention and health promotion. Luz currently operates prevention programs in six sites in Pima Pinal, and Gila counties.

AmeriCorps members will serve as tutors for youth ages 11-18 at the Luz Academy and Adalberto Guerrero School in reading/math/language in classroom group work or afterschool one-on-one sessions. Members will also be trained to teach substance abuse prevention education for youth and families at five Luz sites.

5. **MAAC Project**
Antonio Pizano, President/CEO
Adolfo Ventura, Program Director
22 W. 35th St., Ste 100
National City, CA 91950
(619) 426-4595 (Office)
(619) 426-4592 (Program Director)
(619) 426-2173 fax
aventura@maacproject.org
apizano@maacproject.org

Established in 1965, the MAAC Project is a multipurpose social service agency with a successful 38-year history of serving low-income communities throughout San Diego County. MAAC's mission is to assist low-income residents of San Diego County in meeting their employment, social service, educational, economic and housing needs. MAAC serves 35,000 individuals per year, and over the past 38 years has touched the lives of over 1,000,000 clients to achieve a higher level of self-sufficiency.

AmeriCorps members will serve as tutors and mentors assisting youth in after school programs with reading literacy, ESL, computer literacy, and homework assistance. Members' work will also focus on creating youth leadership opportunities, creating programs that encourage youth participation and leading youth in in community service projects. Members will also assist community residents of all ages to provide on-going support for resident-led activities and resource development efforts.

6. **Midland Community Development Corporation**
David Diaz, Executive Director
Betsy Seanard, Project Coordinator
P.O. Box 11134
Midland, TX 79702
(915) 682-2520
(915) 687-3972
Betsy: 432 684-4309
davidd@midlandhcc.com
bseanard@midland.edu

The Midland Community Development Corporation, (MCDC) was established by the Midland Hispanic Chamber of Commerce as a 501(c)(3) nonprofit to promote economic and community development in economically depressed areas of the city through the institution of programs designed to alleviate conditions of unemployment and blight, and increase the population density through housing efforts, facilitating the creation of new businesses, and administering educational programs.

MCDC AmeriCorps Members will serve as tutors/teaching assistants at the Midland College Cogdell Learning Center or Midland College Adult Basic Education. Members will also be engaged as computer technology instructors at the Learning Center and the Midland Hispanic Chamber of Commerce/Community Development Corporation teaching basic computer operations and the use of the Internet for educational, employment, and career and college exploration. Members assigned to The Learning Center and the Midland Workforce Network will provide employment-readiness and job placement specialists providing employment-readiness counseling and workshops, career exploration assistance, and job placement assistance. MCDC will also utilize members as credit counselors to assist families who

are seeking to become first time homebuyers. Other members will be assigned as financial literacy instructors in a classroom or computer-assisted setting with youth and adults and will be trained to become certified tax preparers to work with the Volunteer Income Tax Assistance (VITA) program during tax season.

7. Unity Council (SSUC)
   Gilda Gonzalez, Executive Director
   Marsha Murrington, Senior Executive Officer
   Lindsay Rojas, Program Manager
   1900 Fruitvale Avenue, Suite 2-A
   Oakland, CA 94601
   (510) 535-6913 (Senior Executive Officer)
   (510) 535-7175 (Program Manager)
   (510) 53407771 fax
   mgm@unitycouncil.org
   lrojas@unitycouncil.org

The Unity Council is a community development corporation located in the Fruitvale area of Oakland. It has demonstrated over 39 years of leadership in social services, housing, community and economic development. Through comprehensive programs it addresses the physical, social and economic development needs of the immigrant and low-income Fruitvale/San Antonio community.

AmeriCorps members at the Unity Council assist LEP and low-income clients who are seeking employment through our One Stop Center, and perform other community service projects that build citizenship. The most notable project is the Volunteer Income Tax Assistance/Earned Income Tax Credit initiative, where members are trained by the IRS and prepare taxes for the low-income community.

8. Spanish American Civic Association (SACA)
   Carlos Graupera, Executive Director
   Dr. Maritza Roberts, Program Director
   Cathy Calkins, Senior Development Officer
   Mayra Serrano, Program Coordinator
   545 Pershing Ave.
   Lancaster, PA 17602
   (717) 397-6267
   (717) 509-1012 (Program Coordinator)
   (717) 295-7762 fax
   mrobertlpcs@yahoo.com
   ccalksaca@aol.com
   mayraboriqua@msn.com

The organization offers a variety of services including the Human Services Network which links clients with a wide variety of needed services they would otherwise find difficult to receive. SACA's educational center, La Academia, works to keep young people in school and to encourage high school dropouts to complete their high school education.

AmeriCorps members will work as teaching assistants and teacher aides assisting in after school programs, working with students in workforce development activities, as well as career exploration activities. SACA's AmeriCorps members will serve as coordinators to expand the involvement of parents in the school and the enlargement of a volunteer effort to serve the needs of the local youth. Members will also serve as tutors and mentors in intensive summer school programs and activities helping students with language development and homework assistance.

9. Tejano Center for Community Concerns
Richard Farias, Executive Director
Barbara Ramirez, Program Director
2950 Broadway
Houston, TX 77017
(713) 644-2340 (Office)
(713) 644-2340 ext 3059 (Program Director)
(713) 644- 2340 ext 3071 (Program Administrator)
(713) 641-1853 fax
farias.r@tccc-ryss.org
bramirez21clc@hotmail.com

Founded in 1992, the Tejano Center for Community Concerns (TCCC) is dedicated to improving opportunities for Hispanics through the provision of educational, social, housing, and economic development initiatives. TCCC operates youth violence prevention programs, ABC/ESL classes, drug abuse and AIDS prevention programs, gang intervention and prevention programs, and the Raul Yzaguirre Charter School for Success. TCCC is also developing a foster care group home and shelter, organizing, resident and homeowner groups, and beginning a homeownership program for low-income families within the Denver Harbor and Port Houston neighborhoods of Houston.

AmeriCorps members will help TCCC increase services in literacy and education programs offered by the center. Members will serve as teacher aides, tutors, adult education instructors, community outreach service providers, and family literacy instructors.

10. Youth Development, Inc. (YDI)
Tess Campodonico, Program Director
6301 Central NW
Albuquerque, NM 87105
(505) 831-6038
(505) 352-3400 fax
tjcampy@hotmail.com

Youth Development, Inc. of Albuquerque, New Mexico, founded in 1971 is a community-based youth service system offering an effective continuum of care designed to help the most vulnerable and at-risk children, youth, and families find their way to their own solutions. Services provided to the community include education, employment and training, health, mental health, counseling services, economic development, affordable housing, and community development.

The "Amerinet" program goal is to improve literacy amongst young people ages 6-17, while providing a fun, safe atmosphere for at-risk youth. AmeriCorps members will provide tutoring, mentoring, job shadowing opportunities and after school exploration at five area Neighborhood Network Learning Centers in Albuquerque and the surrounding area. In addition, through the YDI/Intel Computer Clubhouses, members will provide access to high-end computer hardware and software to supply youth with tools to become successful in the world of technology.

NCLR AMERICORPS
"LATINO EMPOWERMENT THROUGH NATIONAL SERVICE"
(LENS) PROJECT

NATIONAL PROGRAM OBJECTIVES*

Getting Things Done: Education
Tutor low-income/low-achieving children, youth, and adults to increase academic achievement and level of interest in core curriculum, technology, family literacy, and extra-curricular activities.

Getting Things Done: Workforce Development and Technology
Instruct low-income Latino youth and adults in job-readiness skills to improve job-related skills and enhance self-sufficiency in job search/career development.

Member Development: Technical Training and Professional Development
Train AmeriCorps members to enhance job performance and effectively complete their AmeriCorps service positions; provide them with life skills to prepare for "Life After AmeriCorps" in the transition from AmeriCorps member to college student, full-time employee in the workforce, and/or other life choices.

Community Strengthening: Volunteer Recruitment and Collaborative Partnerships
Partner with other community organizations to coordinate and conduct at least two community service events and cultural activities recruiting local community volunteers to support the event.

CORPORATION FOR NATIONAL AND COMMUNITY SERVICE
AND NATIONAL COUNCIL OF LA RAZA
COMMON GOALS

Getting Things Done:

- Solving community problems through service to the community and improving individual lives of those in the community

Strengthening Communities:

- Empowering community members through tutoring, mentoring, instruction and training; allowing community members to become self-sufficient
- Encouraging partnerships at all levels to build bridges among disparate groups to improve the quality of life in the community

Encouraging Sustainability:

- Empowering children, youth, and adults by encouraging responsibility and a "volunteer ethic" to solve community problems and sustain community programs

Expanding Opportunity:

- Providing members the opportunity to expand practical experience through service
- Providing training opportunities that increase member job skills
- Providing members educational opportunities through Education Awards earned through service

NCLR
2005-06
Performance
Measures

General Info

Performance Measurement Title: Tutoring for Literacy

Grant Year: 2005-2006

Performance Measurement Type: Needs and Service Activities

Issue Area: Education

Created By: geraldine schafer 3/4/2004 12:30:17 PM

Output/Outcome: Output, Intermediate Outcome, End Outcome

Available to Programs Sites:

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1. Results
*Identify the **results** you expect to achieve.*

Output Result

a. *Result:*	Output: AmeriCorps members will tutor children, youth and adults.
b. *Indicators:*	Number of children, youth and adults to receive literacy tutoring.

Intermediate Outcome Result

a. *Result:*	Intermediate Outcome: Parents will express satisfaction with progress of tutored students.
b. *Indicators:*	Intermediate Outcome: Percent of tutored students at least 20 hours who are rated "very satisfied" or "extremely satisfied" as reported by teachers.

End Outcome Result

a. *Result:*	End Outcome: Tutored program participants will increase academic performance in literacy by one grade level.
b. *Indicators:*	% of students tutored at least 20 hours who increase reading performance by one grade level (as reported by teachers).

2. Activity *How will you achieve this result?*	**Activity** a. *Members:* b. *Days per week:* c. *Hours per day:* d. *Duration or Interval:* 09/01/2005-08/31/2005 e. *Description:* Members at 10 affiliate sites will tutor children, youth & adults during a 9-12 month program year where tutoring will take place in one-on-one or very small groups of no more than four students per session. Each student will receive at least 90 minutes of tutoring per week. Students will be referred to tutoring by teachers, parents, and case managers.

3. Instruments
What data and instruments will you use to measure the results?
	Output Instruments
	
	a. *Output Instrument A:* Tutoring Log
	
	   Method: Logs and Tally Sheets
	
	Intermediate Outcome Instruments
	
	a. *Int. Outcome Instrument A:* Student Progress Report
	
	   Method: Program Developed Test
	
	End Outcome Instruments
	
	a. *End Outcome Instrument A:* Student Progress Report
	
	   Method: Program Developed Test

4. Targets *What are the **targets** you expect to meet on this performance measure?*	**Output Targets** a. *Output Instrument A:* Tutoring Log *Target:* Year One, XX of students will be tutored at least 20 hours over a 9-12 month program year.

	Intermediate Outcome Targets
	a. *Int. Outcome Instrument A:* Student Progress Report
	Target: Intermediate Outcome: 60% of tutored students at least 20 hours who are rated "very satisfied" or "extremely satisfied" as reported by teachers.

	End Outcome Targets
	a. *End Outcome Instrument A:* Student Progress Report
	Target: Parents will report that 80% of students tutored at least 20 hours will increase academic performance in area of literacy by one grade level.

5. Summary of Performance Measures *Restate the complete performance measures by combining steps 1 and 4 above.*	
	Output Performance Measure Summary
	a. *Summary:* 600 K to adult students from low-income families from 10 sites located in 7 states and the will receive at least 20 hours of tutoring over a 9-12 month program year.
	b. *Part of Grant Award:* Yes
	Intermediate Outcome Performance Measure Summary
	a. *Summary:* Parents will express satisfaction with progress of tutored students such that they will rate 60% of tutored students progress as very satisfied or extremely satisfied.
	b. *Part of Grant Award:* Yes
	End Outcome Performance Measure Summary
	a. *Summary:* 80% of K to adult students from low-income families from 10 sites located in 7 states will increase their literacy performance by one grade level.
	b. *Part of Grant Award:* Yes

General Info

Performance Measurement Title:	**Job Preparedness Coaching**
Grant Year:	2005-2006
Performance Measurement Type:	Needs and Service Activities
Issue Area:	Human Needs
Created By:	geraldine schafer 03/11/2004 09:10:47 AM
Output/Outcome:	Output
Available to Programs Sites:	Building Community Computing Capacity ¿ Chicago Site ID#: 01ADNDC0121501 Spanish Speaking Unity Council AmeriCorps Program Site ID#: 01ADNDC0121001 Youth Development Inc. Amerinet Program Site ID#: 01ADNDC0121601

1. Results *Identify the **results** you expect to achieve.*	**Output Result** *a. Result:* Low income youth and adults will receive job readiness coaching. *b. Indicators:* Number of youth and adults receiving a minimum of 15 hours of job readiness training from AmeriCorps members
2. Activity *How will you achieve this result?*	**Activity** *a. Members:* *b. Days per week:*

	c. *Hours per day:*
	d. *Duration or Interval:* 09/01/2005-08/31/2006
	e. *Description:* AmeriCorps Members will coach affiliate-identifiied low-income, multiple-barriers individuals in job readiness activities on a one-on-one basis and small group sessions for a minimum of 15 hours per week. Activities will include such things as: language acquisition (vocational ESL and basic ESL), job readiness/preparedness, resume writing, interview preparation, job search techniques, basic computer skills, and communication skills.
3. Instruments *What data and instruments will you use to measure the results?*	Output Instruments a. *Output Instrument A:* Member Coaching Log *Method:* Logs and Tally Sheets
4. Targets *What are the* **targets** *you expect to meet on this performance measure?*	Output Targets a. *Output Instrument A:* Member Coaching Log *Target:* Members will provide 500 youth and adults a minimum 15 hours of job readiness training over a 12-month period.
5. Summary of Performance Measures *Restate the complete performance measures by combining steps 1 and 4 above.*	Output Performance Measure Summary a. *Summary:* AmeriCorps members will coach 500 low-income youth and adults providing job readiness training for a minimum of 15 hours using one-on-one or small group sessions. b. *Part of Grant Award:* No

General Info

Performance Measurement Title: AmeriCorps Member Development

Grant Year: 2005-2006

Performance Measurement Type: Participant Development

Issue Area: Participant Development

Created By: geraldine schafer 3/24/2004 2:32:24 PM

Output/Outcome: Output

Available to Programs Sites: ---ALL---

1. Results *Identify the **results** you expect to achieve.*	Output Result	
	a. Result:	Output: Members will pursue career and/or education goals after AmeriCorps service.
	b. Indicators:	Number of NCLR AmeriCorps members to receive education and career exploration opportunities training .

2. Activity *How will you achieve this result?*	Activity
	a. Members:
	b. Days per week:

37

	c. *Hours per day:*
	d. *Duration or Interval:* 09/01/2005-08/31/2006
	e. *Description:* AmeriCorps members at ten sites will participate in 'Life After AmeriCorps ' training and other educational exploration opportunities that will include life and social skills training, resume writing, interview techniques, job search assistance, education options, financial literacy or other topics as requested by individual members. Twenty percent of members' aggregate required service hours will be devoted to member development activities.

3. Instruments
 What data and instruments will you use to measure the results?
	Output Instruments
	
	 a. *Output Instrument A:* Supervisor Progress Report
	
	     Method: Program Developed Test
	
	 b. *Output Instrument B:* Sign In-Sheet
	
	     Method: Logs and Tally Sheets

4. Targets
 What are the **targets** *you expect to meet on this performance measure?*
	Output Targets
	
	 a. *Output Instrument A:* Supervisor Progress Report
	
	     Target: XX members will complete 'Life After AmeriCorps' workbook.
	
	 b. *Output Instrument B:* Sign In-Sheet
	
	     Target: XX members will attend at least 52 hours of Life After AmeriCorps Training (one hour weekly over 52 weeks).

5. Summary of Performance Measures *Restate the complete performance measures by combining steps 1 and 4 above.*	Output Performance Measure Summary
	a. Summary: XX AmeriCorps members from seven sites will participate in at least 52 hours of Life After AmeriCorps training and education and career exploration opportunities training to be better prepared to pursue career and educational goals.
	b. Part of Grant Award: Yes

Performance Measurement Title:	Community Strengthening
Grant Year:	2005-2006
Performance Measurement Type:	Community Strengthening
Issue Area:	Community Strengthening
Created By:	geraldine schafer 3/24/2004 2:32:24 PM
Output/Outcome:	Output
Available to Programs Sites:	---ALL---

1. Results *Identify the **results** you expect to achieve.*	**Output Result** a. *Result:* Output - NCLR AmeriCorps members will recruit, select and assign community volunteers for local service opportunities. b. *Indicators:* Number of non-AmeriCorps volunteers recruited by AmeriCorps members involved in volunteer management at the site.
2. Activity *How will you achieve this result?*	**Activity** a. *Members:* b. *Days per week:* c. *Hours per day:*

	d. *Duration or Interval:* 01/01/2004 - 12/12/2004
	e. *Description:* At least 2 AmeriCorps members at each operating site will work to recruit, select, and assign community volunteers for participation in community based organization programs and services, special community service events or cultural activities sponsored by the operating site. Members will work at least 8 hours per week in this area.
3. Instruments *What data and instruments will you use to measure the results?*	Output Instruments a. *Output Instrument A:* Volunteer Participants Sign Up Sheets *Method:* Logs and Tally Sheets
4. Targets *What are the* **targets** *you expect to meet on this performance measure?*	Output Targets a. *Output Instrument A:* Volunteer Participants Sign Up Sheets *Target:* AmeriCorps members will recruit 100 non-AmeriCorps volunteers for community based organization's programs and services, community events and cultural activities over a 12-month period.
5. Summary of Performance Measures *Restate the complete performance measures by combining steps 1 and 4 above.*	Output Performance Measure Summary a. *Summary:* At least 2 AmeriCorps members from each operating site will work 8 hours weekly over a 12 month period to recruit 100 non-AmeriCorps volunteers for the community based organization's program and services, community events and cultural activities. b. *Part of Grant Award:* Yes

NATIONAL COUNCIL OF LA RAZA
LATINO EMPOWERMENT THROUGH NATIONAL SERVICE (LENS)
OPERATING SITE AGREEMENT

AGREEMENT between the National Council of La Raza (hereinafter referred to as NCLR) and **<<Community Based Organization>>** (hereinafter referred to as OPERATING SITE).

This AGREEMENT is effective **September 1, 2005 through August 31, 2006**.

SECTION I: PURPOSE

This agreement sets forth the terms and conditions for the operation of *NCLR's Latino Empowerment through National Service (LENS)* Community Service Program with the Operating Site.

The purpose of *Latino Empowerment through National Service (LENS)* program is to get things done by strengthening the abilities and opportunities of Latinos in the Hispanic communities through the development and implementation of educational opportunities and technology-driven employment and family literacy programs.

SECTION II: PROJECT DESCRIPTION

The primary goal of the project is the development of an effective community-based model that addresses the educational needs of children as well as the educational and employment needs of low-income youth and older adults through the service of AmeriCorps Members. *NCLR's Latino Empowerment through National Service (LENS)* program serves Hispanic Americans through its NCLR Affiliates that operate educational programs such as designed literacy, language proficiency, and job preparedness skills training.

AmeriCorps members may be placed as tutors, trainers and mentors in after-school reading, math and science programs, arts- and sports-related literacy programs, and family literacy programs. Other AmeriCorps members may also assist in instruction of basic computer and internet skills, computer-based language proficiency, basic education, and employment readiness skills to Hispanic youth and adults, enhancing computer literacy, educational levels, and employment potential. AmeriCorps members should not displace current employee positions nor perform services, duties, or activities that had been assigned to an employee, recently resigned employee or been discharged.

The activities proposed under this agreement constitute the scope of the work, which is to be accomplished by the Operating Sites (**see attached Performance Measures: Getting Things Done, Member Development, and Strengthening Communities**).

SECTION III: DUTIES AND RESPONSIBILITIES

The AmeriCorps program will be conducted in accordance with the following documents:
- The 2005-06 AmeriCorps Provisions (see http://www.americorps.gov/pdf/2005_americorps_provisions.pdf
- The New AmeriCorps Rule (See attached Summary)
- The 2005-06 NCLR Manual (see NCLR AmeriCorps Webpage)
- The 2005-06 operating site budget and performance measures (see the Web Based Reporting System).

Please read the AmeriCorps Grant Provisions carefully and provide a copy to your AmeriCorps Project Director and Finance and Administration staff. Relevant information from the AmeriCorps Grant Provisions must also be communicated to your AmeriCorps members as part of their orientation each year.

To fulfill the program purpose as described in Section I, the Operating Site and NCLR hereby agree to the following:

National Council of La Raza

NCLR shall provide the following services to the Operating Sites in fulfillment of this AGREEMENT:

1. Support for AmeriCorps Operating sites with on-going monitoring and technical assistance by NCLR Regional and Central Office staff.
2. Assist in member recruitment strategies;
3. Conduct appropriate training for staff and members;
4. Foster an ethic of service;
5. Assist in the coordination of AmeriCorps efforts with state commissions and local Corporation for National and Community Service (CNCS)-funded programs;
6. Provide strong financial management at the operating sites and ensure site compliance with fiscal policies and procedures;
7. Act as a liaison between the Corporation and the operating sites;
8. Work with the sites to develop long-term sustainability;
9. Conduct two annual site visits to provide technical assistance, training, and guidance.
10. Communicate with operating sites to share program information through written, telephone, and Internet communications.

Operating Site

A. **Program Responsibilities/Compliance**

The Operating Site shall assign a staff person as the Program Director responsible for the day-to-day management and administration of this program. The Operating Site is responsible for ensuring full compliance with the 2005-06 AmeriCorps Grant Provisions, a copy of which is attached. The Operating Site must also comply with all programmatic and fiscal requirements set forth in this sub-grant agreement. The Operating Site will be responsible for any findings or recommendations, including recovery of grant funds, resulting from noncompliance as determined by CNCS.

Please read the Provisions carefully and provide a copy to your AmeriCorps Project Director and Fiscal Manager. Relevant information from the Provisions also should be communicated to your AmeriCorps members.

A. **Reporting Requirements**

- **Monthly Reports**. The Operating Site shall submit a monthly **Periodic Expense Report (PER)**, to the assigned NCLR program person, **due within five days after the end of each month**, via the Web Based Reporting System (WBRS).
  - The PER should be prepared by the Operating Site finance or accounting department**.**
  - The PER should reflect the operating site's actual monthly program expenditures.
  - The PER must be verifiable and tied to the operating site's internal accounting system.
  - Operating Site must maintain adequate supporting documentation for all reported expenditures and provide copies to NCLR upon request.
  - The PER will be used to verify and justify quarterly grant checks to the operating site.

- **Quarterly Reports**. The Operating Site is required to submit quarterly AmeriCorps Progress Reports (APR), and Financial Status Reports (FSRs) to NCLR via WBRS. **The Operating Site must be current with all**

programmatic and financial report requirements in order to receive reimbursement for quarterly program expenditures.

- **Progress Reports**
  The AmeriCorps Progress Report (APR) map is where you enter your site's performance measures, outputs and outcomes on a quarterly basis. It's also where you generate progress reports. The APR offers tools to assist you in tracking and interpreting your data.

  The APR map has been updated and sites should review the APR tutorial in the Help Manual of the WBRS system for an overview on how the APR now works.

- **Financial Status Reports**
  The Financial Status Report (FSR) is a compilation of three monthly periodic expense reports. The FSR should be created once the operating site has entered three PERs into the WBRS system. The FSR pulls data directly from the PERs and is aggregated automatically for the period specified.

Progress Activity Report and Financial Status Report Schedule

Quarter	Period Starting	Period Ending	Date Due
1	September 1, 2005	December 31, 2005	January 5, 2006
2	January 1, 2006	March 30, 2006	April 5, 2006
3	April 1, 2006	June 31, 2006	July 5, 2006
4	July 1, 2006	August 31, 2006	September 5, 2006

The deadlines for submitting monthly PERs, quarterly FSRs, and quarterly progress reports are provided in the 2005-2006 NCLR Policies and Procedures Manual Calendar. Please share this calendar with appropriate staff.

B. **Member Documentation**
- **Enrollment Forms**. Within 30 days of entering into a commitment (signed member contract) with an individual, the subgrantee will notify the NCLR and the Corporation of the commitment via WBRS. The process of enrolling new members in WBRS begins with recording an applicant's commitment into the ACT.
- **Change of Status Forms.** Member Change of Status Forms must be submitted no later than 30 days after a member's status is changed. Operating Site must request in writing for change of status for members to regional coordinator.
- **Exit/End-of-Term-of-Service Forms**. Member Exit/ End-of-Term-of-Service Forms must be submitted no later than 30 days after a member exits the program or finishes his/her term of service.
- **Member Time and Attendance Sheets/Time Logs**. Operating Site must document and monitor member hours of service. AmeriCorps Members timesheets, signed by the member and an operating site authorized official, must be maintained as support documentation and placed in each member file. **Additionally, member timesheet data must be entered into WBRS on a daily basis or at a minimum on a bi-weekly basis. Monthly time logs should be submitted to NCLR for approval by the 10th day of the following month,** e.g. October time logs would be due on November 10. Operating site program staff should email NCLR when documents are ready in WBRS for approval. **Time logs must be current in order to obtain quarterly program reimbursement.**
- **Health and child care member enrollment verification requirement**. Operating site is required to submit copies of benefit enrollments at the startup of member's term and thereafter on a monthly basis. Additionally, the Operating Site is required to submit Change of Term Status forms to the health insurance carrier and/or childcare provider at the time change occurs. Mandatory programmatic member status reports are required to be submitted to the parent organization as well as to the health care insurance and child care providers. Please note that the Operating Site is responsible for any overpayments made to the insurance and/or childcare provider on behalf of any members the Operating Site fails to exit from the system at the time they leave or complete their terms.

C. **Communication Protocol**.: The NCLR National Program Director is responsible for the oversight of the AmeriCorps*National Direct grant. Day-to-day site operations for the program are monitored by the NCLR AmeriCorps Assistant Director.

REGION	STATES COVERED	ASSIGNED PROGRAM COORDINATOR
Far West, South, Midwest, East	CA, AZ, NM, TX, IL, PA,	Rogelio Quintanar, NCLR Headquarters, Washington, DC

Operating Sites will report directly to Rogelio Quintanar, NCLR AmeriCorps Assistant Program Director. The AmeriCorps National Program Director, Ms. Gerry Schafer may be contacted by any and all operating sites as deemed necessary and appropriate.

D. **Budget and Programmatic Changes**

- **Programmatic Changes**
  The operating site **must obtain prior written approval** from NCLR Program Director before making the following changes in the approved program:
  - Changes in the scope, objectives or goals of the program whether or not they involve budgetary changes;
  - Substantial changes in the level of participant supervision;
  - Entering into additional sub-grants or contracts for AmeriCorps activities funded by the grant, but not identified or included in the approved application and grant budget.

- **Budgetary Changes**
  The operating site **must obtain prior written approval** from NCLR Program Director before deviating from the approved budget in any of the following ways:
  - Reallocation of Funds from the "Member Support Cost" category to other categories.
  - Specific Costs Requiring Prior Approval Before Incurrence under OMB Circulars A-21, A-87 or A-122.
  - Purchases of Equipment over $5,000.
  - Transfer of funds among approved direct cost categories.

SECTION IV: DURATION AND COMPENSATION

A. This is a twelve-month contract effective on **September 1, 2005 and ending on August 31, 2006.**

B. Total contract amount shall not exceed **$XXX,XXX*** to be disbursed on a quarterly expenditure reimbursement basis. This amount is to support the <<**Community Based Organization**>> program with a total of **10** FTE which are allocated as follows:

- two (2) full time/1700 hour **stipended** (2.0 FTE)
- five (5) half time/900 hour **stipended** (2.5 FTE)
- six (6) reduced half time/675 hour **stipended** (2.25 FTE)
- three (3) quarter time /450 hour **stipended** (.75 FTE)
- four (4) half time/900 hour **non-stipended**, Ed Award Only (2.0 FTE)
- two (2) quarter time/450 hour **non-stipended**, Ed Award Only (.5 FTE)

NCLR will issue a one-time advance, against reimbursable expenses, in the amount of **$5,000 **upon execution of this agreement. Stipends are to be paid on a fixed amount in accordance with the member contract and not an hourly rate. **All reimbursements will be based on timely submission of complete and accurate financial and programmatic reports.**

C. **The Operating Site will provide the organization's match of $XX,XXX as agreed to by the approved budget.** This minimum required match will represent:

1. 33% of total operating costs, which includes: staff, program management, Member-related costs (training and education, service gear, etc.), travel, internal evaluation, administration, etc.
2. 15% of Member support, which includes, living allowance, FICA, health care, workers' compensation, and unemployment insurance (if required by state law). The matching contributions for Member support costs (excluding health care) must be cash-match, non-federal funds.

D. Program costs will be paid to the Operating Sites in accordance with the approved budget. NCLR will pay program costs to the Operating Site in accordance with the following:

1. **Expenses for program operations as defined on the approved budget will be reimbursed upon the submission and acceptance of monthly periodic expense reports, quarterly financial statements and progress reports and Members' time/attendance reports.**

2. NCLR will provide a one-time advance against reimbursable expenses to cover the cost of Member support expenses.

3. The Operating Site must retain the financial and program records for seven (7) years after the final program disbursement.

4. The Operating Site shall keep a systematic and detailed record of all expenditures that relate to this grant.

5. NCLR reserves the rights periodically to inspect the programmatic and financial records of the Operating Site in carrying out the obligation to the funder.

E. Any amendments to the approved budget must be submitted to, and approved by, NCLR before expenditures can be made against it. (See Programmatic and Budgetary Changes Above).

SECTION V: EVALUATION

Internal Evaluation
The Operating Sites will conduct periodic internal evaluations to ensure that their objectives are met and to measure the impact of their services in the community, as well as to achieve demonstrable results.

Member Performance Evaluations
Operating sites are to conduct two performance evaluations to ensure AmeriCorps members are achieving project objectives as follows:
1. Mid-year Performance Evaluation – To be conducted by February 29, 2006
2. Year-end Performance Evaluation – To be conducted by August 31, 2006

Refer to NCLR Policies and Procedures Manual for Member Self Evaluation and Site Supervisor Evaluation forms. Evaluations should be completed in a timely manner, signed by the member, and appropriate site supervisor and placed in the member's file (see 2005-06 AmeriCorps Provisions).

Member Service Hour Assessments
Biweekly or monthly meetings with members should be conducted to review the number of hours that members have served towards the total hours of their service, the number of hours remaining to be completed, and the number of weeks remaining to complete those hours. **These meetings should be documented and documentation should be kept in each member file.**

Monitoring Visits

NCLR and the Corporation for National and Community Service may conduct site visits to Operating Sites to observe the program implementation of NCLR AmeriCorps Service Leadership in Action Project. Discussions about the program may be held with staff, AmeriCorps Members, and members of the community. Advance notification of the site visit will be provided to the site prior to the visit.

SECTION VI: TERMINATION CLAUSE

This AGREEMENT may be terminated by NCLR at any time if:

A. The Operating Site defaults in performance of this AGREEMENT if it fails to meet the terms of this agreement. Included in performance default would be the Operating Site's failure to make reasonable progress in the implementation of work for which it is responsible according to the program proposal, and fails to remedy the default within a period of thirty (30) days after receipt of a written notice from NCLR.

B. The funding source for any reason terminates its funding to NCLR.

SECTION VII: DUTY TO COMPLY WITH LAWS

The Operating Site agrees to comply with all current applicable federal, state, and municipal laws, rules, and regulations and those that may be enacted throughout the duration of this contract. Furthermore the AmeriCorps provisions and regulations herein attached shall serve as the governing guidelines for compliance by the Operating Site.

The Operating Site understands that AmeriCorps funds cannot be spent or used for materials, and/or activities to influence the outcome of any public election or any other activity usually restricted by public or private funders.

SECTION VIII: SIGNATURES

NCLR AMERICORPS 2005-2006 GRANT TERM
Acceptance of Special Conditions and Reporting Requirements

I have read the aforementioned Special Conditions and Reporting Requirements and understand that the subgrant will be subject to these terms, conditions and requirements. I certify that **<<Community Based Organization>>** will comply with these special grant conditions and reporting requirements, including the program and financial reporting requirements.

EXECUTIVE DIRECTOR: **PROJECT DIRECTOR:**

_____   _____
Print Name   Print Name

_____   _____
Signature   Signature

_____   _____
Date   Date

VICE PRESIDENT, NCLR:

_____
Print Name

_____
Signature

_____
Date

NATIONAL COUNCIL OF LA RAZA AMERICORPS*NATIONAL DIRECT 2005-06 GRANT TERM
Acceptance of Subgrant Award Form

SUBGRANTEE:

**SUBGRANTEE'S
AMERICORPS ID NUMBER:** <u>##########</u>

PROJECT PERIOD: BUDGET PERIOD: SUBGRANT AMOUNT:

09/01/2004 – 08/31/2007   9/01/2005 – 8/31/2006
Three-year project period   Second budget period

The above-named organization accepts the offer of this subgrant as made in the subgrant agreement enclosed, subject to the terms, conditions and assurances associated with such subgrant, and agrees, as a condition precedent to accepting such subgrant award, to comply with such terms, conditions and assurances.

EXECUTIVE DIRECTOR: **PROJECT DIRECTOR:**

_____   _____
Print Name   Print Name

_____   _____
Signature   Signature

_____   _____
Date   Date

Please keep a copy of this agreement for your records and mail the original to National Council of La Raza AmeriCorps*National Direct, c/o Rogelio Quintanar, Raul Yzaguirre Building, 1126 16th Street, Washington, D.C., by September 9, 2005.

NCLR AMERICORPS OPERATING SITES
SITE ELIGIBILITY REQUIREMENTS

The selection of National Council of La Raza (NCLR) AmeriCorps sites is based upon information provided to NCLR in its Affiliate Application as well as the following selection criteria established by the NCLR AmeriCorps Program.

General

1. Operating site should have written mission, program goals, and objectives.

2. Operating site must have sufficient program staff to manage the program.

3. Operating site should have a capable, stable workforce.

4. Operating site should have previous experience in working with and managing federal grants.

5. Operating site should be able to demonstrate solid past performance in meeting reporting deadlines to government agencies.

6. Operating site should have sufficient infrastructure in place to manage the program.

7. Operating site should demonstrate strong partnerships with other local, state, and federal agencies.

Internal Controls

1. Operating site should have clear lines of authority and responsibility documented in an organizational chart.

2. Operating site should have job descriptions for employees.

3. Operating site should have written management policies establishing responsibility for purchasing, recording transactions, reporting, budgeting, projections, payroll processing, etc.

4. Operating site should have written policies and procedures that describe the accounting system and ensure that similar transactions are processed consistently.

5. Operating site should have on-hand current copies of applicable financial regulations or guidelines which govern their federal programs, e.g. A-110, A-112.

SITE DIRECTOR
TRAINING AND ORIENTATION

Site Director:

A requirement for being selected as a host site for the NCLR AmeriCorps Program is that the operating site program director and/or program coordinator must attend the program director training. This is an important event as new AmeriCorps staff at operating sites are given the opportunity to network with and learn from the more experienced directors. New site directors will receive training in AmeriCorps benefits and prohibited activities, history of CNCS and AmeriCorps, and history of AmeriCorps policies and procedures of NCLR. New directors will be given workshops from both tracks to ensure that they have a broad understanding of AmeriCorps and NCLR. Further training will be given during site visits, through conference calls and frequent communication with the NCLR AmeriCorps Program Director and Assistant Program Director. At a minimum the site directors should be well-versed in:

♦ AmeriCorps Provisions including, but not limited to:
  ♦ Member Eligibility and Document Requirements
  ♦ AmeriCorps Benefits
  ♦ Prohibited Activities
  ♦ Grievance Procedures
♦ Program Objectives
♦ Terms and Conditions of Operating Site Agreement
♦ Life After AmeriCorps
♦ Progress Reporting, Using AmeriCorps Evaluation Tools
♦ WBRS Enrollments and End of Terms
♦ WBRS Time Logs
♦ WBRS Annual Progress Report (APR)
♦ WBRS Periodic Expense Reports (PER) and Financial Status Reports (FSR)

OPERATING SITE DIRECTOR
POSITION DESCRIPTION (SAMPLE)

The NCLR AmeriCorps Initiative

- ✔ Prepare and monitor contractual agreements with all off-site service centers.

- ✔ Facilitate member recruitment and selection; monitor process to ensure eligible members are enrolled as outlined under AmeriCorps provisions.

- ✔ Oversee contractual agreements with all members to ensure proper documentation is on file for enrolled AmeriCorps members.

- ✔ Provide orientation for members and their supervisors.

- ✔ Facilitate ongoing member training.

- ✔ Ensure that on-site supervision of members is provided according to AmeriCorps requirements.

- ✔ Conduct regular site visits to off-site service centers to monitor compliance of programs with AmeriCorps provisions.

- ✔ Collaborate and communicate regularly with all operating site AmeriCorps staff in regards to program guidelines, requirements, and reporting deadlines to ensure effective management of AmeriCorps Program.

- ✔ Monitor all aspects of the AmeriCorps program requirements (**programmatic** and **fiscal** requirements).

- ✔ Help facilitate ongoing evaluations.

- ✔ Ensure that financial management requirements are adhered to and submit requests for payment and required reporting documents **in a timely manner**.

- ✔ Ensure that program reporting requirements are adhered to and submit Progress Reports in a timely manner.

- ✔ Maintain contact with state commissions and identify ways to collaborate, as needed.

- ✔ Organize peer exchange with other AmeriCorps programs as requested.

Members

MEMBER ELIGIBILITY REQUIREMENTS

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

- ♦ Be a U.S. citizen or U.S. national or a lawful permanent resident alien of the United States

- ♦ Be at least 17 years old (or at least 16 years of age if the member is out of school and a participant in a youth corps or a program for certain disadvantaged individuals)

- ♦ Have a high school diploma or GED or agree to obtain one while serving

For documentation requirements, reference the AmeriCorps Provisions.

NEW MEMBER ENROLLMENT

These procedures are designed to help improve the efficiency of internal processing of AmeriCorps members through the NCLR and CNCS systems.

1. The program director will receive and certify eligibility of each member through receipt and review of the documents listed below.
    A. Completed member enrollment form (NCLR AmeriCorps Director is the certifying official) before 25 days after member start date
    B. Completed AmeriCorps application
    C. Evidence of high school graduation (if member's high school is included on the application, that will be sufficient)
    D. Proof of age (birth certificate)
    E. Proof of citizenship (birth certificate or passport) or permanent residency (alien registration card or stamped passport allowing residency)
    F. Completed W-4 tax information
    G. Completed I-9 with supporting documents (not the same as proof of citizenship)
    H. Direct Deposit form with voided check (if chosen)
    I. Criminal background check (if member will be working directly with children)

2. Members may begin their service upon receipt of approval after start date of contract from NCLR.

3. No member will receive his/her living allowance until all items (A through I) are received.

4. Program directors are responsible for enrolling their members in WBRS by entering the Member Information Profile (MIP) and the member's enrollment form. Program directors may make final approval on the MIP before saving it. Program directors must save enrollment forms as "complete awaiting approval." They should not approve enrollment forms. It would cause delays with Education Awards. Enrollments must be completed within 25 days of the member's beginning service. (Please refer to the WBRS online Help Manual "Tutorials" for further information on member enrollments.)

5. Written request for Change of Term of Service should be requested from NCLR. Change of Status form should be entered in WBRS within three months of the member's start date. Refer to Provisions 2003 Section 8.E

6. NCLR AmeriCorps sub-grantees programs and activities must be accessible to persons with disabilities, and NCLR AmeriCorps programs must provide reasonable accommodation to the known mental or physical disabilities of otherwise qualified members, service recipients, applicants, and program staff. All selections and project assignments must be made without regard to the need to provide reasonable accommodations.

    Procedure

    By far, the vast majority of accommodations are inexpensive. For those limited cases where reasonable accommodations are more costly, there is limited amount of money available through State Commissions to provide accommodations for service members. By statute, only Subtitle C competitive State and National Directs AmeriCorps programs may use these funds. The Presidents Committee on Employment of People with Disabilities operates a toll free, confidential, free resource for employers on

reasonable accommodations requirements and options for accommodating employees at (800) 526-7234 (voice/TDD), email at JAN@jan.idci.wvu.edu, or website at www.pcepd.gov.

Accommodations that impose an undue financial or administrative burden on the operation of the program or fundamentally alter its nature are not reasonable accommodations. However, the threat to the health or safety of him or herself or to others, where the threat cannot be eliminated by reasonable accommodations, is not a qualified individual with a disability. In such instances the Grantee must document and prove the direct threat.

Reasonable Accommodation Declaration

The reasonable accommodation policy (first paragraph above) is to be included in outreach and recruitment material as well as the following:

- Member Handbooks

- Member Agreements

- Request for Proposals

- Member Applications

The above policy was adapted from the policy and procedures manual of the ESD 112 AmeriCorps Policy and Procedures manual.

MEMBER FILE MAINTENANCE AND RETENTION

In addition to the documents listed in "New Member Enrollments" each member's file must include the following original copies: (A Member File Checklist is should be used by each site for tracking all required documentation.) The necessary forms to enroll and create files for each member can be downloaded from the NCLR AmeriCorps website.

♦ Member Contract: Each member must sign a contract for participation in the AmeriCorps Program. This contract lays out the responsibilities and expectations for the members. The contract includes the Service Description, Grievance Procedures, Prohibited Activities, suspension and termination rules, and acceptable conduct. If the member is under the age of 18, a Parental Consent signature must be obtained.

♦ Service Description: Included in the Member Contract.

♦ Grievance Procedure: Included in the Member Contract.

♦ Prohibited Activities: Included in the Member Contract.

♦ Pre-Service Member Survey: This survey is to be completed by the member at the time of enrollment.

♦ Mid-Year Member Survey: This survey is to be completed by the member at the mid-year evaluation after six months of service.

♦ Post-Service Member Survey: This survey is to be completed by the member at the end of his/her service.

♦ Member Evaluation I: (Mid-year) To be completed after six months of service.

♦ Member Evaluation II: To be completed at the member's end of service.

♦ Acceptance/Waiver Form: Each member's file must include this form which indicates if a member chooses health care, child care, and/or loan forbearance. See the relevant sections for eligibility.

♦ Time Sheet/Activity Log: A hard copy of each monthly time log that the member served must be included in his/her file. (See the section on Time Logs for further instructions.)

♦ Documentation for member disciplinary actions.

Record Retention: Each file must be kept in accordance with the following record retention policy: In accordance with the Grant Provisions for the AmeriCorps member program, each AmeriCorps program will maintain member files, financial records, evaluation reports, and other supporting documentation for a period of seven years from the date of submission of the final Progress Report. Such records will be maintained beyond the seven-year period if an audit is underway. This policy will remain in effect until further notice from the Corporation for National and Community Service.

NCLR AMERICORPS MEMBER CONTRACT

I.   PURPOSE

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

II.   MINIMUM QUALIFICATIONS

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

III.   TERMS OF SERVICE

A.   The member's term of service begins on _____ and ends on _____. The Program and the member may agree, in writing, to extend this term of service for the following reasons:

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

B.   The member will complete a minimum of _____ hours of service during this period.
  i.   Full-Time Members – Must serve 1700 hours during a period of not less than nine months and not more than one year.
  ii.   Half Time Member – Must serve at least 900 hours during a period of one or two years as indicated in the approved budget.
  iii. Reduced Half-Time Members – Must serve at least 675 hours over a time not to exceed one year.
  iv.   Quarter-Time Members – Must serve at least 450 hours over a time not to exceed one year.
  v.   Minimum Time Members – Must serve at least 300 hours over a time not to exceed one year.

C.   The member understands that to complete the term of service successfully (as defined by the program and consistent with regulations of the Corporation for National and Community Service) and to be eligible for the education award, he/she must complete all the hours of service (as noted in B above) and satisfactorily complete pre-service training and the appropriate education/training that relates to the member's ability to perform service.

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

  1.   Completed the required number of hours
  2.   Satisfactorily completed assignments, tasks, or projects
  3.   Met any other criteria that were clearly communicated both orally and in writing at the beginning of the term of service

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

IV. POSITION DESCRIPTION (See attached Member Position Description)

The name of the member's direct supervisor is _____.

V. BENEFITS

A. The member will receive from the Program the following benefits:
Living Allowance Calculation (2003 Provisions 11.b). 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 biweekly. Programs may use their organization's payroll system to process members' living allowances. However, if a payroll system cannot be altered and must show 40 hours in order to distribute a living allowance, then members' service hours should be documented separately to keep track of their progress toward the Program's total required AmeriCorps service hours.

  1. A living allowance in the amount of:_____

     a. The living allowance is taxable, and taxes will be deducted directly from the living allowance.
     b. The living allowance will be distributed *[weekly/biweekly]* by *[direct deposit] [check]* starting on _____[date]_____. The biweekly amount will be _____.

  2. *[Health benefits (if the member is eligible). The health insurance policy is attached.]*

  3. If applicable, a child care allowance of _____ will be provided by the National Association of Child Care Resources and Referral Agencies (NACCRRA) directly to the provider, if the member qualifies for the allowance. (NACCRRA will distribute this allowance evenly over the term of service biweekly).

B. Upon successful completion of the member's term of service, the member will receive an education award from the National Service Trust. For successful completion of a full-time term, the member will receive an education award in the amount of $4,725. For successful completion of a part-time term, the member will receive an education award of *[up to $2362.50.]*

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

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

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

VI. RULES OF CONDUCT

A. At no time may the member:
1. Engage in any activity that is illegal under local, state, or federal law
2. Engage in activities that pose a significant safety risk to others
3. Engage in any AmeriCorps-prohibited activities that include:
    - Any activity involving attempting to influence legislation or an election or aid a partisan political organization
    - Helping or hindering union activity
    - Engaging in religious instruction
    - Conducting worship services
    - Providing instruction as part of a program that includes mandatory religious instruction or worship
    - Constructing or operating facilities devoted to religious instruction or worship
    - Maintaining facilities primarily or inherently devoted to religious instruction or worship
    - Engaging in any form of religious proselytization
    - Organizing or engaging in protests, petitions, boycotts, or strikes
    - Impairing existing contracts for services or collective bargaining agreements
    - Participating in, or endorsing, events or activities that are likely to include advocacy for or against political parties, political candidates, political platforms, proposed legislation, or elected officials
    - Providing a direct benefit to a for-profit entity, a labor union, a partisan political organization, a religious organization, or a nonprofit that engages in lobbying

B. The member is expected to, at all times while acting in an official capacity as an AmeriCorps member:
1. Comply with the rules and standards of the host agency.
2. Demonstrate mutual respect toward others
3. Follow directions
4. Direct concerns, problems, and suggestions to [*designate the appropriate program official here*]

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

1. Unauthorized tardiness
2. Unauthorized absences
3. Repeated use of inappropriate language (i.e., profanity) at a service site
4. Failure to wear appropriate clothing to service assignments
5. Stealing or lying
6. Engaging in any activity that may physically or emotionally damage other members of the program or people in the community
7. Unlawful manufacture, distribution, dispensation, possession, or use of any controlled substance or illegal drugs during the term of service
8. Consuming alcoholic beverages during the performance of service activities
9. Being under the influence of alcohol or any illegal drugs during the performance of service activities
10. Failure to notify the program of any criminal arrest or conviction that occurs during the term of service

D. Under the Drug-Free Workplace Act, you must immediately notify the Program Director if you are convicted under any criminal drug statute. Your participation in the Program is conditioned upon compliance with this notice requirement, and we will take action for violation of this.

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

1. For the member's first offense, an appropriate program official will issue a verbal warning to the member.

2. For the member's second offense, an appropriate program official will issue a written warning and reprimand the member.

3. For the member's third offense, the member may be suspended for one day or more without compensation and will not receive credit for any service hours missed.

3. For the fourth offense, the Program may release the member for cause.

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

VII. RELEASE FROM TERMS OF SERVICE

A.   The member understands that he/she may be released for the following two reasons:
1.   For cause, as explained in paragraph (B) of this section
2.   For compelling personal circumstances as defined in paragraph (C) of this section

F.   The Program will release the member for cause for the following reasons:

1. The member has dropped out of the program without obtaining a release for compelling personal circumstances from the appropriate program official.
2. During the term of service the member has been convicted of a violent felony or the sale or distribution of a controlled substance.
3. The member has committed a fourth offense in accordance with paragraph (E) of section VI of this agreement.
4. The member has committed any of the offenses listed.
5. The member has committed another serious breach that, in the judgment of the program director, would undermine the effectiveness of the Program.

C.   The Program may release the member from the term of service for compelling personal circumstances if the member demonstrates that:

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

D. Compelling personal circumstances which do not constitute leaving the Program:
1. To enroll in school
2. To obtain employment, other than moving from welfare to work
3. Because of dissatisfaction with the Program

E. The Program may suspend the member's term of service for the following reasons:

1. During the term of service the member has been charged with a violent felony or the sale or distribution of a controlled substance. (If the member is found not guilty or the charge is dismissed, the member may resume his/her term of service. The member, however, will not receive back living allowances or credit for any service hours missed.)

2. During the term of service the member has been convicted of a first offense of possession of a controlled substance. (If, however, the member demonstrates that he/she has enrolled in an approved drug rehabilitation program, the member may resume his/her term of service. The member will not receive back living allowances or credit for any service hours missed.)

F. The Program may suspend the member's term of service for violating the rule of conduct provisions in accordance with the rules set forth in paragraph (C) of section VI of this agreement.

G. If the member discontinues his/her term of service for any reason other than a release for compelling personal circumstances as described in paragraph (B), (D), and (E), the member will cease to receive the benefits described in paragraph (A) of section V and will receive no portion of the education award or interest payments.

H. If the member discontinues his/her term of service due to compelling personal circumstances as described in paragraph (C) of section VII of this agreement, the member will cease to receive benefits described in paragraphs (B) and (C) of section V.

I. Program director must submit written notification to NCLR and health care providers and cancel health insurance within one week of the member's exit date and submit written notification to NCLR and NACCRRA (child care) providers and cancel child care.

VIII. GRIEVANCE PROCEDURES (See attached Grievance Procedure and AmeriCorps Provisions, Sec. 34)

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

G. The member understands that, as a participant of the program, he/she may file a grievance in accordance with the Program's grievance procedure.

IX. Program has written policies that address:

a) Grievance Procedures
b) Drug-Free Workplace
c) Nondiscrimination
d) Reasonable accommodation for members with disabilities

X. AMENDMENTS TO THIS AGREEMENT
This agreement may be changed or revised only by written consent by both parties.

XI. AUTHORIZATION

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

AmeriCorps Member   AmeriCorps Program Director

_____   _____
Signature   *Signature*

_____   _____
Name   *Name*

_____
Parent/Legal Guardian

_____   _____
Date   *Date*

Attachments:
- ◆ *Member Position Description (Provided by Operating Site)*
- ◆ *Grievance Procedures (Attached)*

AMERICORPS PROGRAM GRIEVANCE PROCEDURES

In accordance with 42 U.S.C. 12636 and implementing regulations at 45 C.F.R. 2540.230, the following grievance procedures have been established by the AmeriCorps program to deal with grievances from participants, labor organizations, and other interested individuals.

Step 1 of the grievance process should be the filing of a "written" grievance by the affected party seeking personal relief in a matter of concern or dissatisfaction relating to any service-related issues, such as assignments, evaluations, suspension, or release of cause. Should the affected party decide to file a grievance, the following options are available for settling a grievance:

- Option 1: Resolution though Immediate Supervisor. Prior to initiating the formal written grievance procedure, the aggrieved member should refer the complaint to his/her immediate supervisor who will attempt to resolve the complaint by mediation.

- Option 2: Optional Alternative Dispute Resolution (ADR). As a first option, a member may choose to have the operating site designate a neutral party to resolve the complaint. Please read the ADR section regarding specific guidance and time limits for ADR process.

- Option 3: Grievance Hearing. A member may choose a grievance hearing to resolve the complaint. A written request for such a hearing must be made in writing to the Program Director. Please read the Grievance Hearing section regarding specific guidance and time limits for the grievance hearing and the grievance hearing decision.

- Option 4: Binding Arbitration. Bind Arbitration is available to the affected party only if a grievance hearing decision is adverse or if no decision is made within 60 days of the filing of the initial grievance. Please read the Binding Arbitration section regarding specific guidance and time limits for arbitration proceedings.

Optional Alternative Dispute Resolution (ADR)

ADR must be selected within 45 days of the underlying dispute. If a member chooses ADR as a first option, a neutral party designated by _____ (operating site) will attempt to facilitate a mutually agreeable resolution. The neutral party must not have participated in any previous decisions concerning the issue in dispute. ADR is confidential, nonbinding, and informal. No communications or proceedings of ADR may be referred to at the grievance hearing or arbitration stages. The neutral party may not participate in subsequent proceedings.

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

Grievance Hearing

A member may request a grievance hearing without participating in ADR or if the ADR process fails to facilitate a mutually agreeable resolution. The member should make a written request for a hearing to the program director, _____. Except for a grievance that alleges fraud or criminal activity, a

request for a grievance hearing must be made within one year after the date of the alleged occurrence.   At the time a request for a hearing is made, the program should make available to the member information that it relied upon in its disciplinary decision.

The executive director/CEO of _____ (operating site) will conduct the grievance hearing. The person conducting the hearing may not have participated in any previous decisions concerning the issue in dispute. A hearing must be held no later than 30 calendar days after the filing of the grievance, and a written decision must be made no later than 60 calendar days after filing.

Binding Arbitration

An aggrieved party may request binding arbitration, if a grievance hearing decision is adverse or if no decision is made within 60 days of the filing of the grievance. The arbitrator must be independent and selected by agreement of both parties. If the parties cannot agree on an arbitrator, the Corporation for National and Community Service's Chief Executive Officer (CEO) will appoint an arbitrator from a list of qualified arbitrators within 15 business days after receiving a request from either party.

An arbitration proceeding must be held no later than 45 calendar days after the request for arbitration or no later than 30 calendar days after the appointment of an arbitrator by the executive director/CEO of _____ (operating site). An arbitration decision will be made no later than 30 calendar days after the commencement of the arbitration proceeding.

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

AMERICORPS MEMBER JOB ANNOUNCEMENT
(SAMPLE)

Program: National Council of La Raza
                                 1111 19th Street, NW, Suite 1000
                                 Washington, DC 20036
                                 www.nclr.org

Program Details:

Program: AmeriCorps "Latino Empowerment Through National Service"
Program Type: AmeriCorps*National Direct
Program Period: September 1, 2005-06

Position Description (Duties, Requirements, and Benefits)
Job Title: AmeriCorps Technology Tutor

Member Duties: AmeriCorps members will teach computer skills to youth and

                                 adults through classroom training; manage computer lab and

                                 coordinate basic computer trainings; develop a mentoring program;

                                 conduct community outreach by attending networking meetings

                                 where relationships can be established; develop public outreach

                                 strategies and create opportunities for community collaborations

                                 like libraries, schools, and job training centers; assess technology

                                 opportunities; train volunteers to teach others in basic computer

                                 and Internet skills; and organize related projects.

Terms:
Work Schedule: Full-time (1,700 hours of service)
Service Area: Education and Technology
Length of Tour: 12 months
Age Minimum: 18 years
Age Maximum: None

Requirements:
Skills Requirement: General Skills, Communications, Computers, Public Speaking,
                                 Teaching/Tutoring, Writing/Editing

Education
Requirement: High School Graduate/GED

**Program
Benefits:**   Stipend, education award (upon successful completion of service), training, health Insurance, child care

Application Information:

Accepting Applications: 09/01/05 to 12/31/05
Additional Requirements: Cover letter and current resume

Contact Information: Andre Reyes, Site Supervisor
(202) 776-0009

How to Apply:
Email: areyes@nclr.org

MEMBER BENEFITS

Health Care Policy

Full-Time Members: You must provide health care coverage to all full-time members who do not have health care coverage at the time of joining AmeriCorps or to those who lose coverage due to their participation in the program. In addition, programs must provide health care coverage if a full-time member loses coverage during the term of service through no deliberate act of his or her own, such as a parent dropping coverage or spousal job loss.

Part-Time Members: You may enroll part-time members; however, you may not use any Corporation funds to pay for the premium cost. The exception to this regulation is for part-time members who are serving a full-time capacity for a sustained period of time (such as full-time summer project who may be eligible for health care benefits supported with Corporation funds, although that coverage must be approved in the Grant.

Health care coverage is not provided for family members or dependents.

Members on Medicaid: You must provide health care coverage to all full-time members even if they are eligible for Medicaid. The U.S. Department of Health and Human Services has taken the position that members receiving Medicaid have coverage available to them through AmeriCorps. Because Medicaid "wraps around" other available health care coverage, Medicaid will pick up only the costs that are not covered under the AmeriCorps policy. Members who remain on AFDC will continue to receive Medicaid for their dependents. Members who lose AFDC due to the living allowance usually can continue to receive extended Medicaid coverage for their dependents for up to one year. Program applicants should consult with their caseworker before enrolling in AmeriCorps.

Member Enrollment: The health care plan is underwritten by Continental Assurance Company, Chicago, Illinois. Administrative functions are handles by Strategic Resource Company (SRC), Columbia, South Carolina.

Entering each active, eligible member on an AmeriCorps Health Care Roster Form enrolls all new members. AmeriCorps Health Care Roster Forms are completed and sent to Strategic Resource Company (SRC). From the roster, SRC enters enrollment information into its information system and establishes health coverage for the members. **There are no enrollment forms for the member to fill out.**

Subsequent changes to enrollment are also reported on the AmeriCorps Health Care Roster Form. After sending the initial form, a new roster is sent to SRC by the 15th of **each** month even if there are no changes for health coverage from the previous month. This reporting is important in order to maintain positive enrollment for adds, drops, or changes.

FAX Rosters to SRC
1-803-865-3787
Rosters Must Be Received at SRC
By the 15th of Each Month

---

*If you fail to complete a monthly roster form and do not remove a member from coverage, SRC will only apply a credit back for two months coverage if a claim has not been paid. If a claim has been paid, then a credit will not be applied. **It is the responsibility of the program to ensure that positive enrollment is maintained**.*

Coverage is effective immediately on the first day an individual becomes an active member of the AmeriCorps Program provided the person enrolls and does not waive coverage. If you fail to enroll a member immediately, SRC will backdate the enrollment if necessary. This usually occurs when a member has been overlooked from being put on the roster. For each month that is backdated, the premium will reflect on the next invoice as an adjustment. Payment for the health care plan is prorated by SRC for members whose effective date is after the first day of the month. In the first month of a member's enrollment, a daily calendar rate will be charged for those members who are not enrolled for the full calendar month. However, payment for the month in which a member leaves the program will not be prorated. A full month is required for all members in their last month. Invoices should not be prorated by the completing program; prorated billing will be calculated by SRC only, as the system automatically handles this calculation.

Members who are reinstated must be reported on the AmeriCorps Member Health Care Roster Form in the Action Code column as an "R" for reinstatement of coverage or "N" for new enrollment. Show the date of reinstatement or new enrollment in the Action Date column.

A member not eligible for the plan or does not elect coverage through AmeriCorps, must fill out a Waiver Form. The Waiver Form verifies the member's waiver of coverage under the plan and eliminates possible confusion if the member subsequently submits a claim. All Waiver Forms should be maintained in your program's files (do not forward to SRC). A member's waiver of coverage is reported to SRC on the AmeriCorps Member Health Care Roster Form.

- SRC sends an AmeriCorps Program Data Form requesting program information needed for system set-up.

- SRC sends an AmeriCorps Health Care Roster Form for enrollment of members (also used for adds, drops, or changes).

- Once the AmeriCorps Program Data Form and AmeriCorps Health Care Roster Form have been returned to SRC, it is then entered into SRC's system.

- Then SRC sends a materials package that contains:
    - Administrative Manual with Copy of the Policy
    - ID Cards and Plan Information Summaries
    - Brochures
    - Medical Claim Forms
    - AmeriCorps Health Care Roster Forms
    - Request for Supplies Form
    - Waiver Forms
    - All other required forms for selected plan

The program designates an administrator for the health care plan who:

- Distributes plan materials to enrolled members.

- Provides monthly Roster Form – maintaining current enrollment–which is easy to complete, requires minimal information, and can be mailed or faxed.

- Reviews monthly invoice to ensure positive enrollment.

- Reports monthly additions, terminations, and other changes to SRC by way of the roster; for months

with no changes, the roster is submitted with a check in the **NO CHANGE** box.

♦ Reviews the invoice from SRC each month for positive enrollment.

♦ Remits payment to SRC monthly in the amount of the invoice. The program will continue to receive an invoice each month reflecting the unpaid balance that has been carried forward.

CONTACT NUMBERS:
Julie M. Starnes
Strategic Resource Company
221 Dawson Road
Columbia, SC 29224
(803) 865-3237 office
(803) 736-9952 fax

Child Care Policy:

NCLR provides the following guidelines for child care. These are guidelines only as each case is determined by the state in which the member serves. Operating site directors are required to determine a member's eligibility and have other responsibilities in conjunction with child care. They should refer to the Program Director's Handbook (**AmeriCorps Provisions, Sec. 11f**) for further information including part-time members. Site directors may contact NCLR for initial guidance or to obtain the phone number and/or address for NACCRA, the child care coordinator.

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

♦ Are parents or custodians of dependents under 13 years of age who reside with them
♦ Need child care in order to participate
♦ Are not receiving child care from any other sources at the time of their acceptance into the program
♦ Have a family income that does not exceed their state's income eligibility guidelines

Members can indicate their acceptance or waiver of this benefit on the NCLR Acceptance/Waiver Form.

AmeriCorps*Care child care benefits are administered through the office of NACCRRA. Program directors, AmeriCorps members, and providers may contact:

AmeriCorps*Care at 1-800-570-4543 or by mail at:

AmeriCorps*Care c/o NACCRRA
1319 F Street, NW, Suite 500,
Washington, DC 20004

HEALTH INSURANCE PLAN FOR AMERICORPS PARTICIPANTS

INSURANCE WAIVER FORM

PARTICIPANT NAME

SOCIAL SECURITY NUMBER

DATE OF BIRTH | DATE OF HIRE

I hereby certify that I am otherwise covered by a health care policy and therefore not eligible for participation in the Health Insurance Plan for AmeriCorps participants. My signature acknowledges that I waive coverage under this plan.

PARTICIPANT SIGNATURE

INSURANCE CARRIER (if applicable)/ POLICY NUMBER

CHILD CARE WAIVER FORM

AmeriCorps Participants

PARTICIPANT NAME

SOCIAL SECURITY NUMBER

DATE OF BIRTH

DATE OF HIRE

I hereby certify that I waive the child care benefit coverage offered as a full-time AmeriCorps member.

PARTICIPANT SIGNATURE

DATE

MEMBER TRAINING REQUIREMENTS

Member Orientation:

Programs as a whole must allocate at least 80% of the required participation to direct service activities and up to 20% of the aggregate required service hours to education and training. Direct service hours and training hours should be recorded on member timelogs on a regular basis. Each AmeriCorps Program should provide members with the following training:

Orientation Activities:
♦ Time Sheet (Record keeping)
♦ Frequency and distribution of Living Allowance, not hourly "pay"
♦ Benefits; Health Care, Child Care, Loan Forbearance, Education Award
♦ Prohibited Activities
♦ Drug-Free Workplace
♦ Rules of Conduct and Safety
♦ Grievance Procedures
♦ Program Objectives
♦ Member Contract
♦ AmeriCorps Standards, a review of the AmeriCorps Program objectives
♦ NCLR resources and programs

Member Development Training:
♦ Youth Leadership and Development
♦ Conflict Resolution
♦ Communication Skills
♦ Diversity Awareness
♦ Personal Goal-Setting
♦ Appearance and Presentation Skills
♦ Life After AmeriCorps
♦ Progress Reporting, Using AmeriCorps EvaluationTools
♦ Citizenship *(Roadmap to Civic Engagement, A Publication of Service Learning Northwest)*

* Each site is encouraged to add topics to this list which will enable the site to provide quality service specific to its needs, such as:

♦ Service-Learning
♦ Literacy Tutoring
♦ Mentoring Youth

Local AmeriCorps host sites are also expected to take part in training events sponsored by their state commissions. It is incumbent upon the site directors to communicate with their state commissions to learn about these events. To get in touch with your state commission refer to the list provided at the beginning of this manual. NCLR encourages regular communication with your state commission for training events and other opportunities to network with other AmeriCorps programs in your state. This is especially important for those members who enroll and begin their service after the AmeriCorps orientation and who will be given the orientation by their site directors.

EXITING MEMBERS POLICY

Exiting Members:

Program directors should take the following steps to complete End of Term Forms for their current members and exit them from WBRS:

♦ **MEMBERS MUST BE EXITED FROM WBRS WITHIN *30 DAYS* OF COMPLETING THEIR SERVICE.**

♦ Check the member's file for complete documentation.

♦ Be sure that all WBRS time logs are current and accurate prior to the submission of exit form and NCLR program director approval.

♦ Complete a hard copy of the End of Term Form and maintain in member file. Forms can be downloaded from WBRS.net.

♦ Exit the members from WBRS. Save the document as "complete awaiting approval." (NCLR will give final approval on the WBRS document.)

♦ Submit written notification to NCLR and health care providers and cancel health insurance within one week of the member's exit date.

♦ Submit written notification to NCLR and NACCRRA (child care) providers and cancel child care.

♦ End of Term Forms (and thereby education awards) will not be approved until the above steps have been completed and all required member documentation is on file. (Refer to Member Check List.)

♦ (Please refer to the WBRS online Help Manual for further information.)

TIME LOGS:

The following steps should be taken in the keeping and submission of member's time sheets.

1) Daily hours are kept by the individual member.

2) Daily hours are verified and signed by the site director or immediate supervisor.

3) Daily hours are transferred to the time sheet, signed by the member, and verified and signed by the site director.

4) The site director enters hours into WBRS <u>at least on a monthly basis</u>. (Please refer to the WBRS online Help Manual for further information.)

5) The site director must notify the NCLR Regional Coordinator that the time sheets are completed and awaiting approval in WBRS.

6) The AmeriCorps site director cross-checks hard copies and WBRS time logs.

7) If any time logs are found to be incorrect or not properly signed by both the member and the site director, the site director is advised and asked to correct the problem or obtain signatures as needed and resubmit the time log in question in WBRS.

8) The site director must meet with each member monthly to review the hours earned and the hours per week that remain for the member to complete his or her term of service in the allowable time (minimum of nine months, maximum of 12 months). Member should be provided a hard copy of monthly hours signed by member and supervisor. A copy of this form should remain in the member's file.

9) On the time sheet, service hours and training hours should be clearly indicated. The ratio of training hours to service hours should be monitored.

10) **On the time sheet, service activities toward objectives should be clearly stated in order to facilitate completion of the accomplishment data in the progress reports.**

11) Reference Sample Time Log.

National Council of La Raza
Time Log

Member Name:

Operating Site:

Date	Time In	Time Out	Description: Who was served, what was accomplished, where was service provided?	# Service Hours	# Training Hours
			Total Hours:		

I am verifying that the AmeriCorps member has completed _____ hours in the pay period from _____to _____.

Signature:_____
                       (AmeriCorps Member, Date)

Reviewed and Approved:_____
                       (Site Supervisor, Date)

Authorized:_____
                       (Program Director, Date)

Hours accrued to date _____ Hours remaining to complete term of service_____

			National Council of La Raza **Sample Time Log**		
Member Name: Gabriel Diaz					
Operating Site: La Raza Central (LRC)					
Date	**Time In**	**Time Out**	**Description:** **Who was served, what was accomplished, where was service provided.**	**#** Service Hours	**#** Training Hours
03-11-02	8:30 am	11:30 am	Instructed 4 LRC adults in "Word" program at LRC computer lab. Lesson 1 topics covered: 1) opening , 2) creating, 3) saving a document 4) navigating 5) selecting	3	
03-12-02	1:00 pm	5:00 pm	LRC Leadership Training Part I: 1) Leadership in the Community 2) Vision 3) Communicating 4) Motivating 5) Collaboration		4
03-13-02	1:00 pm	5:00 pm	Repeated 3-07-02 lesson with 6 high school youth. Also Lesson 2 covered: 4) editing, 5) copying text, 6) formatting 7) checking spelling and grammar	4	
03-14-02	8:30 am	11:30 am	Worked with LRC computer instructor to develop power point lessons: Started work on creation of lesson outlines. Completed 1 lessons on: 1) Getting Started	3	
03-15-02	1:00 pm	5:00 pm	Provided instruction to 6 adults at LRC-Satellite Service Center. Topics covered: 1) opening , 2) creating, 3) saving a document 4) navigating 5) selecting	4	
3-18-02	1:00 pm	5:00 pm	Continued development of power point lessons: Completed a second lesson: 2) Creating, Opening, and Saving	4	
3-19-02	1:00 pm	5:00 pm	Monitored practice session of 6 high school youth on Word program. Covered Practice documents #1 through #5 in the lesson plan.	4	
3—20-02	8:30 pm	11:00 pm	Instructed 4 LRC adults in "Word " program at LRC computer lab. Repeated Lesson 1 and began Lesson 2.	2.5	
3-21-02	1:00 pm	5:00 pm	Provided instruction to 6 adults at LRC Satellite Service Center. Repeated lesson of 3-14-02	4	
3-22-02	1:00 p.m.	5:00 pm	LRC Leadership Training Part II: 1) Making Decisions, 2) Facilitating, 3) Planning and Organizing, 4) Serving as a Tutor		4
			Total Hours:	28.5	8

I am verifying that the AmeriCorps Member has completed_36.5_____hours in the pay period from___03-11-06_____to ___03-12-06_____.

Signature:_____Signed Gabriel Diaz / March 22, 2006_____
  (AmeriCorps Member, Date)

Reviewed & Approved:___*Signed Javier Dominguez/March 22, 2006_____*   _____
  (Site Supervisor, Date)

Authorized:_____Signed Cecilia Rosa/March 25, 2006_____
  (Program Director, Date)

Programming
Requirements

WBRS AMERICORPS PROGRESS REPORTS

♦ All reporting due dates are in the NCLR AmeriCorps Program Calendar.

♦ The operating site AmeriCorps program director is responsible for reviewing the WBRS tutorial on the "Overview of the Annual Progress Report (APR)" found in the WBRS On-line Help Manual.

♦ Each site is then responsible for working with NCLR Assistant Director to set up its Performance Measure Worksheet and establishing Output Codes that pertain to the measures and entering output data into the Map.

♦ After the initial process of setting up the APR Map, sites are required to update their APR Map on a monthly basis.

♦ These updates are due within 10 days from the end of the month being reported.

♦ All reporting deadlines must be complied with. All sites must be current with all reports. Sites not current with reports will not be reimbursed until they submit all reports.

♦ Sites may, at their discretion, use the APR tab in WBRS to enter any "Great Stories" or program events that they feel to be significant and worthy of special attention. These can be added to the NCLR Grantee Progress Report that is submitted to the Corporation for National and Community Service (CNCS).

♦ NCLR is currently required to submit a Grantee Progress Report (GPR) once a year to CNCS. The APR Maps that the sites create and complete are inherited into this Aggregate GPR where the site director can edit them to make a more readable aggregate document. The site director can also add any of the Great Stories to the GPR to draw attention to those sites that have submitted the stories.

♦ Sites should refer to the WBRS Online Help Manual for further information and guidance to complete the APR Map.

♦ For additional guidance, sites should refer to attached Sample APR and Sample Great Stories.

FISCAL POLICIES

For further clarification on any fiscal issues refer to policies and procedures in:

- Walker & Company Fiscal Management Manual
- AmeriCorps Provisions

Financial Systems

Operating sites should have the following systems in place:

1. Automated accounting system

2. System of authorizations and approvals for all significant actions or financial transactions

3. Chart of accounts to identify all accounts in the accounting system

4. Bonded financial staff who handle assets or perform significant financial duties

5. Accounting and financial manual in place which describes policies and procedures

6. Established time reporting system for employees which tracks time on various site programs

7. Ability to provide annual audit report

8. Sufficient nonfederal and private funds to cover program match

Site Information Files

The files for each NCLR AmeriCorps operating site will be maintained by the operating site program director.

Each site is responsible for maintaining files containing the following:

- AmeriCorps Budget, Title Page, and Program Narrative
- The Subgrantee Site Agreement of Participation in the AmeriCorps Program
- Program Objectives
- WBRS Transactions and Specific Requests
- Any Special Stories or Programmatic Reports, (FSR) and (PER)
- General Correspondence
- Updated Member Files

Record Retention Policy

Each file must be kept in accordance with the following record retention policy: In accordance with the Grant Provisions for the AmeriCorps member program, each AmeriCorps Program will maintain member files, financial records, evaluation reports, and other supporting documentation for a period of seven years from the date of submission of the final Progress Report. Such records will be maintained beyond the seven-year period if an audit is underway. This policy will remain in effect until further notice from the Corporation for National and Community Service.

Record Confidentiality

Member Paper Files: All Operating Sites are required to use the appropriate Member File Checklist and maintain all documents in an individual, confidential member file. They are to be kept in a locked and/or secured area at the operating site and be available for monitoring from Parent, the Corporation for National and Community and/or state auditor staff. Each Operating Site should develop systems for maintaining the confidentiality of their AmeriCorps member files.

Forms and Documents

MEMBER FILE CHECKLIST
2005-2006 Program Year

Member Name:

Program Year:

Service Hours Term: **_____** FT **_____** PT **_____** Other

Date Enrolled:_____   **Date Exited:**_____

Are the following items in the member's file?	Yes	No
o **Member Application**		
o **Member Enrollment Form**		
o **Member Contract**		
o **Time Sheets**		
o **Position Description**		
o **Documentation Member Eligibility**		
o **Verification of Age**		
o **Verification of Citizenship/Residence**		
o **Verification of High School Diploma/GED**		
o **Documentation of Health Care Enrollment (if member is eligible)**		
o **Documentation of Child Care Eligibility (if member is eligible)**		
o **Tax Documents W-4, W-2**		
o **Loan Forbearance Request Form (if applicable)**		
o **Publicity Release Form**		
o **Mid-term Performance Evaluation / End of Term Evaluation**		
o **Member End of Term/Exit Form**		
o **Documentation of Compelling Personal Circumstances (if applicable)**		
o **Change of Status Form (if applicable)**		
o **Disciplinary Documentation (if applicable)**		
o **Member Insurance Waiver Form**		
o **Other**_____		

Notes:

Evaluation Forms

NCLR AMERICORPS
MID-YEAR EVALUATION FORM

Member Name: _____

Placement Site: _____

Period Covered by Evaluation: _____

Evaluation Date: _____

Please assess the AmeriCorps member using the following scale:

1- POOR   2-FAIR   3-ACCEPTABLE   4-GOOD   5- EXCELLENT

1. Flexibility	1	2	3	4	5
2. Reliability	1	2	3	4	5
3. Ability to take initiative	1	2	3	4	5
4. Ability to solve problems	1	2	3	4	5
5. Ability to balance family, service, and school commitments	1	2	3	4	5
6. Ability to set appropriate boundaries with colleagues and clients	1	2	3	4	5
7. Ability to respond to feedback, i.e., constructive criticism	1	2	3	4	5
8. Ability to work with colleagues	1	2	3	4	5
9. Ability to work with supervisor	1	2	3	4	5
10. Ability to work with clients	1	2	3	4	5
11. Ability to work independently	1	2	3	4	5

12. Ability to convey appropriate information	1	2	3	4	5
13. Ability to make appropriate referrals	1	2	3	4	5
14. Ability to maintain written records	1	2	3	4	5
15. Understanding of role as AmeriCorps member	1	2	3	4	5
16. Demonstration of leadership	1	2	3	4	5
17. Commitment to increasing knowledge and expertise	1	2	3	4	5
18. Punctual – comes prepared to provide service	1	2	3	4	5
19. Understands NCLR and AmeriCorps program objectives	1	2	3	4	5
20. _	1	2	3	4	5
21. _	1	2	3	4	5
22. _	1	2	3	4	5
23. _	1	2	3	4	5

24. In my opinion the member's greatest strength is:

25. In my opinion the member needs to improve in relation to: (Please list three goals that will guide the member's progress over the remainder of his/her term and how the supervisor will help the member reach goals which can later be evaluated.)

a.

b.

c.

26. What else can be done to support this AmeriCorps member in personal development and with accomplishments during this service year?

27. Other comments:

Site Supervisor's Signature: _____

Member's Signature: _____

Evaluation Meeting Date: _____

NCLR AMERICORPS
MID-YEAR SELF-EVALUATION FORM

Your Name: _____

Placement Site: _____

Period Covered by Evaluation: _____

Evaluation Date: _____

Please circle a number in each category that corresponds to your evaluation of yourself using the following scale:

1- POOR	2-FAIR	3-ACCEPTABLE	4-GOOD	5- EXCELLENT

1. Flexibility (Ability to adjust to change)	1	2	3	4	5
2. Reliability (Being able to keep your word)	1	2	3	4	5
3. Commitment to service	1	2	3	4	5
4. Ability to solve problems	1	2	3	4	5
5. Ability to balance family, service, and school commitments	1	2	3	4	5
6. Ability to set appropriate boundaries with colleagues and clients	1	2	3	4	5
7. Ability to respond to feedback, i.e., constructive criticism	1	2	3	4	5
8. Ability to work with colleagues	1	2	3	4	5
9. Ability to work with supervisor	1	2	3	4	5
10. Ability to work with clients	1	2	3	4	5

11. Ability to work independently	1	2	3	4	5
12. Ability to convey appropriate information	1	2	3	4	5
13. Ability to make appropriate referrals	1	2	3	4	5
14. Ability to maintain written records	1	2	3	4	5
15. Understanding of role as AmeriCorps member	1	2	3	4	5
16. Demonstration of leadership	1	2	3	4	5
17. Commitment to increasing knowledge and expertise	1	2	3	4	5
18. Punctual - comes prepared to provide service	1	2	3	4	5
19. Understands NCLR and AmeriCorps program objectives	1	2	3	4	5

20. I am most proud of myself and my involvement in the NCLR AmeriCorps program because:

21. These are the ways I need to get better at what I am doing:

22.What do you need in terms of training or support to provide better service and make this a better experience for yourself?

27.Other comments:

Member's Signature: _____

Today's Date: _____

NCLR AMERICORPS
END OF SERVICE
MEMBER EVALUATION

In filling out this End of Service Evaluation, reflect back on the goals you identified for yourself.

1. During my year-long service to AmeriCorps I have improved my personal skills in the areas of:

2. What I have gotten out of my AmeriCorps experience is:

3. During my year-long service to AmeriCorps I have worked toward my educational goals in the following ways:

4. During my year-long service in AmeriCorps, I have worked toward my career goals in the following ways:

5. Overall, I have accomplished the following personal or professional goals during this year of service:

Member's Signature_____

Date:_____

NCLR AMERICORPS EVALUATION FORM
(Filled out by Site Supervisor)

Member Name: _____

Placement Site: _____

Services provided by AmeriCorps member: _____
_____

Evaluation Date: _____

Please assess the AmeriCorps member using the following scale:

1- POOR   2-FAIR   3-ACCEPTABLE   4-GOOD   5- EXCELLENT

1. Serves as a positive role model	1	2	3	4	5
2. Is reliable and dependable	1	2	3	4	5
3. Ability to take initiative	1	2	3	4	5
4. Ability to solve problems	1	2	3	4	5
5. Ability to convey appropriate information	1	2	3	4	5
6. Ability to make appropriate referrals	1	2	3	4	5
7. Punctual - comes prepared to provide service	1	2	3	4	5
8. _	1	2	3	4	5
9. _	1	2	3	4	5
10. _	1	2	3	4	5

11. In my opinion the member's greatest strength is:

12. In my opinion the member needs to improve in relation to:

13. Other comments:

Site Supervisor's Signature: _____

Member's Signature: _____

Evaluation Meeting Date: _____

NCLR AMERICORPS EVALUATION FORM
(Filled out by Stakeholder)

Member Name: _____

Placement Site: _____

Services provided by AmeriCorps member: _____
_____

Evaluation Date: _____

Please assess the AmeriCorps member using the following scale:

1- POOR   2-FAIR   3-ACCEPTABLE   4-GOOD   5- EXCELLENT

1. Serves as a positive role model	1	2	3	4	5
2. Is reliable and dependable	1	2	3	4	5
3. Ability to take initiative	1	2	3	4	5
4. Ability to solve problems	1	2	3	4	5
5. Ability to convey appropriate information	1	2	3	4	5
6. Ability to make appropriate referrals	1	2	3	4	5
7. Punctual - comes prepared to provide service	1	2	3	4	5
8. _	1	2	3	4	5
9. _	1	2	3	4	5
10. _	1	2	3	4	5

11. In my opinion the member's greatest strength is:

12. In my opinion the member needs to improve in relation to:

13. Other comments:

Site Supervisor's Signature: _____

Member's Signature: _____

Evaluation Meeting Date: _____

Site Visits

SITE VISIT PROTOCOL

The following two sections describe the NCLR strategy and protocol for monitoring both AmeriCorps members and AmeriCorp sites.

Strategy:

♦ National monitor: NCLR AmeriCorps Program Director and Regional Program Coordinator will monitor all AmeriCorps operating sites.

♦ Local monitor: Local operating site AmeriCorps Program Director will monitor local AmeriCorps site as well as any additional service sites.

♦ Conference calls and email communications under the direction of the NCLR AmeriCorps Program Director will be conducted on a monthly basis throughout the program year.

♦ Monthly WBRS reports will be submitted to NCLR by each AmeriCorps site.

♦ At least one annual site visit will be conducted by NCLR to the participating operating AmeriCorps sites.

♦ Mid-Term and End-of-Term evaluations will be conducted by the local operating site AmeriCorps Program Director

♦ AmeriCorps site staff will enter WBRS time logs monthly.

♦ AmeriCorps members submit activity logs monthly.

Protocol:

The monitoring process has been designed to assist NCLR AmeriCorps Programs in complying with the rules, regulations, and reporting required by the Corporation for National and Community Service (CNCS). The monitoring tool, designed with the assistance of AmeriCorps directors and staff, is based on the following information:

- AmeriCorps Grant Provisions
- Federal Regulations
- Definitions and Guidelines from the Corporation

The monitoring process and tool will also enable program staff and administration to review their strengths and challenges as they relate to compliance prior to being monitored during a site visit. It can be helpful in preparing for any formal external audit as well. The monitoring process is **not** designed to be a "gotcha" type of punitive system, but rather one aspect of continuous improvement in NCLR AmeriCorps Programs which can be used to address items of concern.

The process for monitoring site visits is outlined below:

1. Train/orient all NCLR AmeriCorps directors and relevant staff in identifying continuous improvement issues to increase quality programming.

2. Prior to the visit a cover letter, agenda, and a site visit monitoring tool will be sent to the host site. (See attached samples.)

3. The monitoring site visit will be made by the NCLR AmeriCorps Program Director and NCLR Regional Program Directors. The monitoring site visit will be conducted using the same monitoring tool as mailed. At the conclusion of the visit there will be a meeting to discuss the results of the visit with the host site program staff. Programs will be given one month to respond to any issues identified. Necessary follow-up will be performed between NCLR and host site staff.

4. Within 15 days of the site visit NCLR will provide a written summary report outlining the strengths, areas of continuous improvement, and compliance issues. The operating site has 30 days from the date of the summary report to respond to the compliance issues identified during the site visit.

NCLR SITE VISIT TOOL

Grantee Function/Responsibility	Was the Practice Observed?	Items for Follow-up
FISCAL SYSTEMS		
When required, obtain written approval from parent organization for budget changes.		
Documentation and approved signature and date on invoices and vouchers.		
Accounting system segregates cost of grants and awards and there is a chart of accounts.		
Accurately track expenditures by line budget item.		
Accurately track in-kind matching contributions and enter them into the accounting system.		
Accurately document and track cash matching contributions.		
Program distributes the stipend as a living allowance and not an hourly wage.		
Staff time and attendance records are signed by individual and official.		
Staff time records indicate time spent on AmeriCorps grant and other projects.		
REPORTING AND COMMUNICATION		
Submit accurate member forms in a timely manner.		
Submit Progress Reports when they are due.		
Produce Progress Reports that provide all required information.		
Submit Financial Reports when they are due.		
Produce Financial Reports that provide all required information.		
Show on FSRs that program is meeting match requirements.		
Submit Annual Accomplishment review in a timely manner.		
Produce Annual Accomplishment Reviews.		
Enter information in WBRS in a timely manner.		

Submit to a A-133 audit annually and cooperate with the follow-up process.		
Obtain permission from NCLR prior to significant budgetary or programmatic changes.		
Maintain an acceptable level of communication with NCLR.		
Respond in a timely manner to inquires from NCLR.		
MEMBER DOCUMENTATION IN FILES		
Member application.		
Eligibility documentation for AmeriCorps, health, and child care, where applicable.		
Member written agreement to complete high school diploma/ GED where applicable.		
Documentation of eligibility to serve based on age, citizenship, education, and high school/GED.		
Member Contracts signed with position descriptions (parental permission for members under 18 years old).		
Grievance Procedures presented with Member Contract		
Members receive regular updates on the number of hours they have served.		
Health Care Coverage made available for eligible FT members. (Waiver Forms)		
Child care coverage made available for eligible FT members.		
Criminal background checks for members working with children and other vulnerable groups.		
Member documentation (Member Enrollment Form, End-of-Term of Service Form) submitted in WBRS.		
Approval from NCLR and documentation for Change of Status, Early Release Forms, Compelling Personal Circumstances.		
Justification and documentation for prorated education award for compelling personal circumstances.		
Member Evaluations.		
Accurate documentation and signatures on time sheets.		

POLICIES AND PROCEDURES		
Have a recruitment plan that encourages diversity and targets local and national representation.		
Program has written policies that address: a) Grievance Procedures b) Drug-Free Workplace c) Nondiscrimination d) Reasonable accommodation		
Evidence of AmeriCorps identity.		
Support members getting GED and post-service educational transition.		
Provide members with appropriate supervision, including semi-annual performance reviews.		
Promptly notify member enrollment changes to child and health care providers and parent organization.		
Track progress toward achievement of program objectives.		
Provide training that meets program requirements.		
Provide training that prepares members for their service.		
Ensure that no more than 20% of the aggregate member service hours are spent in education, training, or nondirect service activities.		
Utilize an evaluation plan to assess program outcomes and local community impact.		

Do operating sites have a monitoring protocol for service sites if members are placed outside of the operating site? Scheduled tool, feedback, follow-up.

Is there a formal agreement or Memorandum of Understanding between operating site and service site?

Are the director and site supervisor familiar with AmeriCorps Program Requirements and prohibited activities?

Operating Site: _____

PREVIOUS YEAR'S MONITORING ACTIVITIES

Site visits by NCLR Program Director or regional program director and findings:

Desk Monitoring (WBRS, progress reports, phone calls, other):

Grantee strengths and challenges:

RISK INDICATORS FOR THIS OPERATING SITE

- [ ] Legal applicant turnover/Staff turnover
- [ ] Low-quality program performance
- [ ] Low-quality operating site performance
- [ ] Late reporting   Financial   Progress Report
- [ ] Inaccurate reporting
- [ ] Programmatic issues
- [ ] Fiscal issues
- [ ] Rapid growth
- [ ] WBRS data
- [ ] Multiple grants/many new initiatives
- [ ] History of complaints from the field
- [ ] Last visit more than one year ago
- [ ] Requested a visit

Risk Assessment Rating: High [ ]   Moderate [ ]   Low [ ]

GOALS FOR THIS OPERATING SITE:

RECOMMENDED MONITORING ACTIVITIES FOR GRANT YEAR:

Site Visit

Desk Monitoring

Technical Assistance