



AmeriCorps Washington

PY22-23 Orientation

July 13 – 8:30am Session

Please sign-in via the chat box:

- Organization/Program
- Name(s)
- What are you most looking forward to this AmeriCorps year?

July 13 - today

1pm – Emotional Well-Being of BIPOC

3pm – Intro to Data Equity

July 14 - Thursday

8:30am – Updates/Grant Req

12pm – Social Lunch

1pm – Cost-Reimbursement Orient

3pm – Fixed-Amount Orient

fiscal orientations

July 15 - Friday

8:30am – Office Hours





Hello!
Robyn Harris
Senior Program Officer





Message from
Serve Washington
Executive Director
Amber Martin-Jahn



Serve Washington

Mission Statement

Serve Washington advances national service, volunteerism and civic engagement to improve lives; expands opportunity to meet the local critical needs of residents of Washington; and strengthens community capacity while creating healthy and resilient communities.

Vision Statement

National service, volunteerism, and civic engagement are the foundation for caring communities and a thriving Washington.



Agenda

09:00 – Chapters 1&2 – *Where can all this be found?*

09:15 – Chapter 3 – *What systems do I need now?*

10:00 – break

10:15 – Chapter 4 – What systems do I need next?

10:45 – Common Pitfalls

11:00 – Chapters 5&6 – *Serve WA approach to reporting and compliance*

11:15 – break

11:30 – Performance Management

11:45 – Q&A

12:00 – Adjourn



Where Can This Be Found?

<https://servewashington.wa.gov/programs/americorps/subgrantee-resources>

- AmeriCorps Program Handbook
 - Handbook
 - New Program Checklist
 - Appendix Docs & Templates
- Additional Resources
 - Terms & Conditions
 - Brand/Comm/Recruit Guide
 - Life After AmeriCorps Guide
- Subgrantee Meeting Materials
 - Orientation
 - Annual In-Person Meeting
 - Quarterly Webinars

...and much, much more!



AmeriCorps Director Role

Are you the new “CEO” of your AmeriCorps program?

Executive Director

HR Manager

Case Manager

Grants Manager

Social Worker

Supervisor



Accountant

Compliance Officer

Communications Specialist

Contracts Specialist

Emergency Manager



Chapter 1

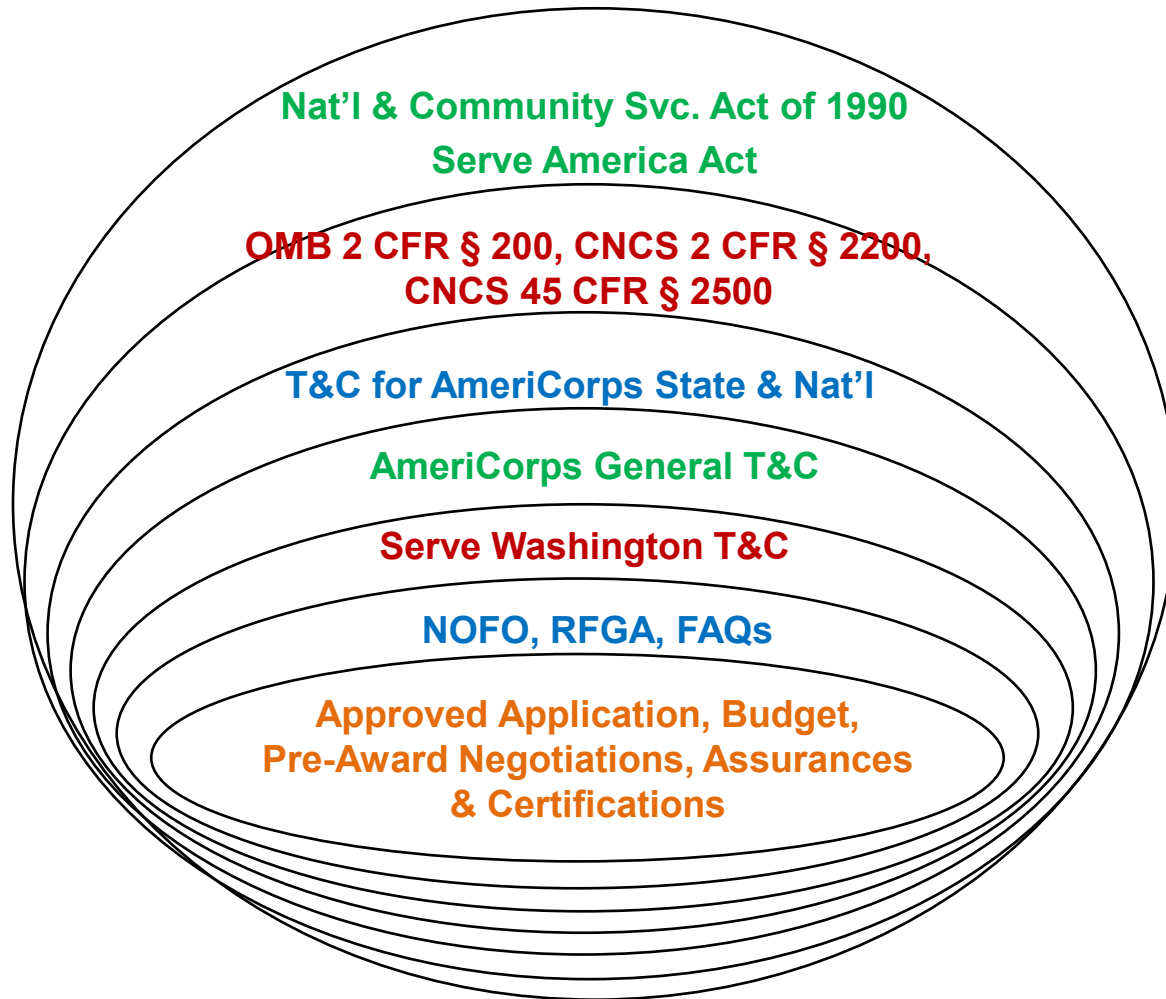


AmeriCorps or CNCS?

AmeriCorps is the operating name for the Corporation for National and Community Service also known as CNCS. The dba AmeriCorps is frequently seen and referenced as the primary name for the federal agency; however, much of the statute and regulations still refer to the Corporation or CNCS. AmeriCorps, AmeriCorps the Federal Agency, the Corporation, and CNCS are all interchangeable. The Handbook leans towards the use of AmeriCorps or AmeriCorps the Federal Agency depending on context but leaves the Corporation and CNCS when directly quoting or citing a statute/regulation.



“The AmeriCorps Onion”



Bookmark Me!

[AmeriCorps – State Subgrantees](#) (scroll down and use “filter” to find specific support)

[National Service Criminal History Checks](#) (some important topics have their own landing page)

Code of Federal Regulations

- [2 CFR](#) 200/2200 – Grants and Agreements OMB/CNCS (fiscal)
- [45 CFR](#) 2500 – Public Welfare CNCS (program)

[Serve Washington](#)

[Serve Washington Funding Opportunities](#)

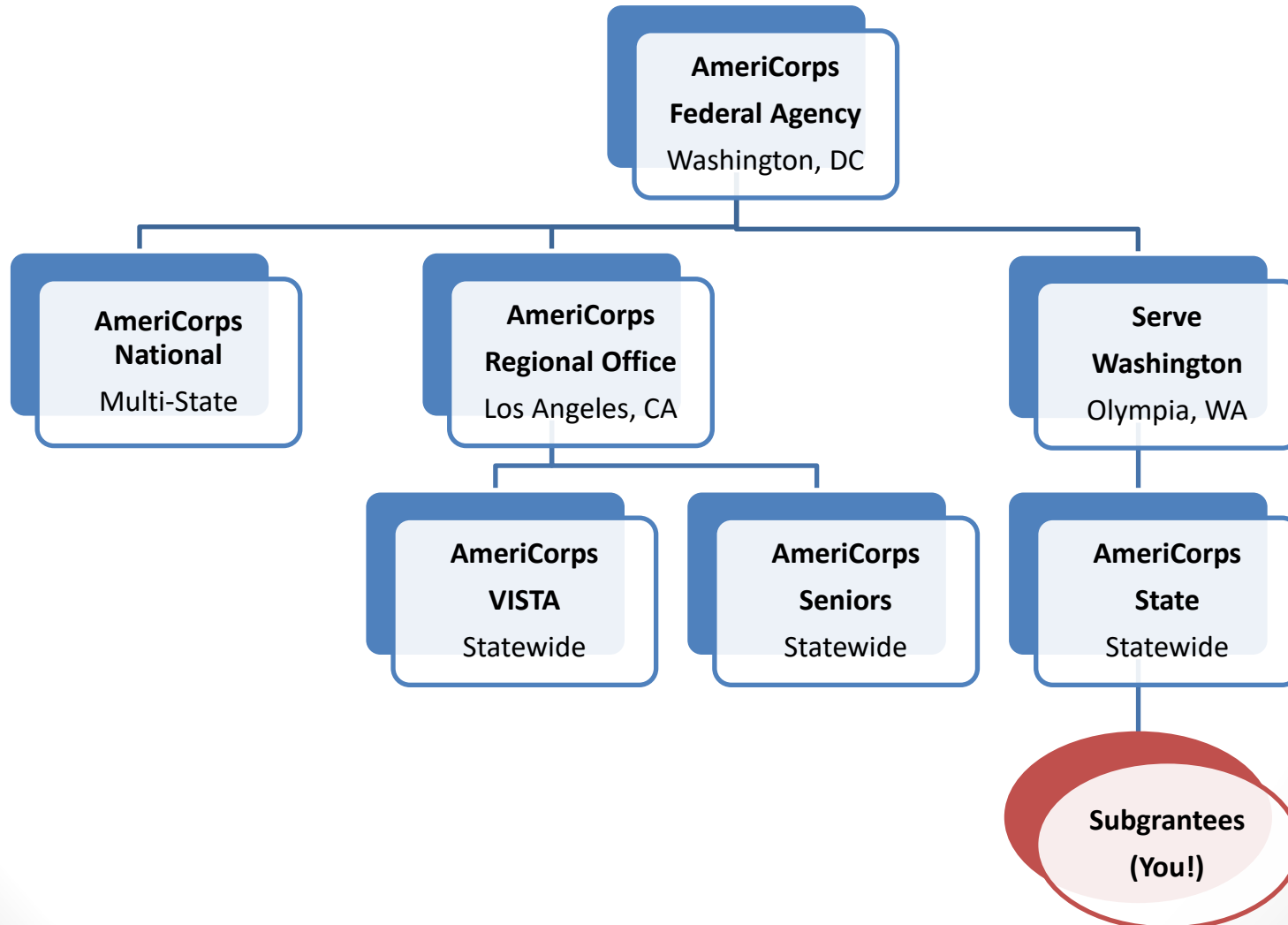
[Serve Washington Subgrantee Resources](#)



Chapter 2



National Service in WA



Chapter 2 – cont.

- ✓ **National Days of Service**
- ✓ **Special Initiatives and Events**
- ✓ **Training and Technical Assistance**



Chapter 3



Definitions

- ✓ **Prime Grant vs Subgrantee**
- ✓ **Grant #, Application #, State Contract #**
- ✓ **NOFO vs RFGA**
- ✓ **Competitive vs Formula**
- ✓ **Member Positions vs MSY vs Slot Types**
- ✓ **Cost-Reimbursement vs Fixed-Amount Subgrantees**
- ✓ **AmeriCorps Members vs Employees**



Policies & Procedures

- ✓ **Non-Discrimination**
- ✓ **Prohibited Activities**
- ✓ **Reasonable Accommodation**
- ✓ **Drug-free Workplace**
- ✓ **Grievances**
- ✓ **National Service Criminal History Checks**
- ✓ **Member Eligibility**
- ✓ **Member Leave**
- ✓ **Member Teleservice**
- ✓ **Reporting**
- ✓ **Recordkeeping**

...and much more!



Prohibited Activities

- While charging time to the AmeriCorps program, members accumulating service or training hours, or otherwise performing activities supported by the AmeriCorps program or the Corporation, staff and members may not engage in the following activities....
- ...AmeriCorps members may not engage in the above activities directly or indirectly by recruiting, training, or managing others for the primary purpose of engaging in one of the activities listed above. Individuals may exercise their rights as private citizens and may participate in the activities listed above on their initiative, on non-AmeriCorps time, and using non-CNCS funds. Individuals should not wear the AmeriCorps logo while doing so.
- Federal Regulation: [45 CFR 2520.65](#)



Prohibited Activities

- a. Attempting to influence legislation;
- b. Organizing or engaging in protests, petitions, boycotts, or strikes;
- c. Assisting, promoting, or deterring union organizing;
- d. Impairing existing contracts for services or collective bargaining agreements;
- e. Engaging in partisan political activities, or other activities designed to influence the outcome of an election to any public office;
- f. Participating in, or endorsing, events or activities that are likely to include advocacy for or against political parties, political platforms, political candidates, proposed legislation, or elected officials;
- g. Engaging in religious instruction, conducting worship services, providing instruction as part of a program that includes mandatory religious instruction or worship, constructing or operating facilities devoted to religious instruction or worship, maintaining facilities primarily or inherently devoted to religious instruction or worship, or engaging in any form of religious proselytization;
- h. Providing a direct benefit to—
 - i. A business organized for profit;
 - ii. A labor union;
 - iii. A partisan political organization;
 - iv. A nonprofit organization that fails to comply with the restrictions contained in section 501(c)(3) of the Internal Revenue Code of 1986 related to engaging in political activities or substantial amount of lobbying except that nothing in these 9 provisions shall be construed to prevent participants from engaging in advocacy activities undertaken at their own initiative; and
 - v. An organization engaged in the religious activities described in paragraph (g.) above, unless CNCS assistance is not used to support those religious activities;
- i. Conducting a voter registration drive or using CNCS funds to conduct a voter registration drive;
- j. Providing abortion services or referrals for receipt of such services; and
- k. Such other activities as CNCS may prohibit.



Prohibited Activities

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

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



Allowable Activities

So, what's allowable!?

Grant approved activities; and remember...

- Direct Service 70%+
- Education/Training <20%
- Fundraising <10%



Member Eligibility

- An AmeriCorps member must:
 - Be at least 17 years of age at the commencement of service; or under special circumstances be an out-of-school youth 16 years of age at the commencement of service.
 - Have a high school diploma or GED or agree to obtain prior to using the education award; or under special circumstances obtain a waiver.
 - Be a citizen, national, or lawful permanent resident of the United States.
 - Satisfy the National Service Criminal History Check eligibility criteria.
- Federal Regulation: [45 CFR 2522.200](#)



Member Eligibility

- Helpful tips
 - Currently, DACA status does not qualify for AmeriCorps State eligibility (it does for VISTA)
 - Do not rely on or use I-9 forms for AmeriCorps eligibility (used for work status by many organizations, AmeriCorps is not work)
 - Pros/Cons of retaining copies of eligibility:
 - + have proof at your fingertips
 - - requires safe and secure storage of PII
 - If not retaining copies of eligibility:
 - Identify original document reviewed
 - Identify what criteria it confirms (age, citizenship, perm res, etc.)
 - Consider documenting the ID number
 - Sign and date review occurred
 - *in some cases, programs or members may need to provided documentation to AmeriCorps



Criminal History Checks

- AmeriCorps: [NSCHC Website](#)
- CNCS Federal Regulation: 45 CFR [2522](#) and [2540](#)
- Program Handbook: Page 26+
- NSCHC E-Course: [CNCS Learning Management System \(Litmos\)](#)
 - Staff identified as having a role or responsibility in conducting and documenting NSCHCs must complete this training **annually**.



Criminal History Checks

- Complete and Adjudicated NSCHC for:
 - All AmeriCorps Members (18 and over)
 - Staff (paid directly by the grant through federal share or grantee share-match of a cost-reimbursement award)
- When must final Adjudication be complete and documented?
 - BEFORE work or service (at minimum one day BEFORE)
- Who is ineligible to work/serve in AmeriCorps?
 - Anyone who refuses to consent to NSCHC
 - Anyone who makes a false statement in connection to NSCHC
 - Anyone who is registered or required to be registered on a sex offender registry
 - Anyone convicted of murder



Criminal History Checks

- WA State Required [Vendors](#):
 - Truescreen
 - NSOPW Check
 - State of Service Check (WA)
 - State of Residence Check (if applying from outside of WA)
 - Fieldprint
 - FBI Check



Chapter 3 – cont.

- ✓ **Financial Management**
- ✓ **Non-Duplication, Non-Displacement**
- ✓ **Tutoring Requirements**
- ✓ **Non-Discrimination, Non-Harassment**
- ✓ **Inclusion**
- ✓ **Position Descriptions**
- ✓ **Member Service Agreements**
- ✓ **Member Benefits**
- ✓ **Recruitment & Selection**
- ✓ **Time Tracking**
- ✓ **AmeriCorps Affiliation**



Take a break.
You deserve it!



AmeriCorps
Washington



Chapter 4



AmeriCorps Member Files

Hard Copy or Electronic
Grant Record

- Application Docs
 - National App or Program App/Resume? References?
- W-4
 - (for member receiving living allowance)
- Government-Issued ID (or review of)
 - Passport, Driver's License, etc.
- Proof of Citizenship and Age (or review of)
 - Passport, Birth Certificate, I-151, etc.
- **Adjudicated** Criminal History Checks
- **Signed** Member Service Agreement
- Position Description (if separate from MSA)
- Media Release (if separate from MSA)(cite **AmeriCorps, Serve WA, OFM**)
- Health Insurance Enrollment/Waiver Form
- Performance Reviews
- **Signed** Timesheets
- Documentation for Exits
 - Cause?
 - Compelling Personal Circumstances?
- Parental/Caregiver Consent (< 18)



eGrants Tutorials

Learn all aspects of eGrants here:

<https://servewashington.wa.gov/programs/americorps/subgrantee-resources/cncs-program-development-outlines>

CAUTION!

Couple outdated components:

- Hard copy enrollment/exit forms are no longer allowed. Everything must be done electronically.
- Programs are no longer allowed to complete the member portions of enrollment/exit. Please be sure members are completing their own information.
- Pre-Enrollment has a series of steps not covered in the tutorials.
- Enrollment is required within 8 days, not 30 days.



Enrollment/Exit

AmeriCorps requires programs to enroll and exit members electronically in eGrants/My AmeriCorps.

- **Pre-Enrollment...BEFORE** member start date/hours.
- **Enrollment...within 8 CALENDAR DAYS** of start date/hours.
- **Exit...within 30 CALENDAR DAYS** of last day of service.



Enrollment

AmeriCorps requires programs to pre-enroll, and enroll members electronically in eGrants/My AmeriCorps.

- **Pre-Enrollment...BEFORE** member start date/hours.
- **Enrollment...within 8 CALENDAR DAYS** of start date/hours.

Well before this...programs should have completed “pre-work”...

- Recruitment
- Screening/Selection
- Determined Eligibility
- Completed and Adjudicated Criminal History Checks
- Began Collection and Documentation of Member File



eGrants Pre-Enrollment

When program/member “pre-work” has been done, programs/members can begin electronic “pre-enrollment” ...

BEFORE START OF SERVICE/HOURS

- 1) Program Invites/Selects Member in eGrants
- 2) Member Accepts and Fills Out Member Sections
- 3) Automatic/Manual Verification of Eligibility Occurs
- 4) Program Certifies Criminal History Check Verification
- 5) Program Completes Program Sections

...once these steps are completed, the “enrollment” button will be activated...



eGrants Enrollment

When program/member “pre-enrollment” has been done, programs can finalize electronic “enrollment”...

Within 8 CALENDAR DAYS of START OF SERVICE/HOURS

1) Program clicks final enrollment button

...the step of changing the status from pre-enrolled to enrolled cannot be completed until the first day of service and no later than 8 days after the first day of service....

CAUTION! Disallowances (costs and/or member hours) may occur if programs are found to be non-compliant with enrollment.



eGrants System of Record

- **CNCS *AmeriCorps* Terms and Conditions**
 - Start Date in eGrants is Effective Date (system of record)
 - eGrants start date
 - MSA start date
 - Hours start date
 - MUST ALL MATCH
 - And...
 - IF DATES DON'T MATCH
 - eGrants is the official date
 - Amend MSA to match eGrants
 - Disallow Hours prior to eGrants date





Please remember, an individual is officially an AmeriCorps member on the start date recorded in eGrants. Prior to this start date, individuals should not accrue any service hours



Enrollment Training Resources

- [Serve WA Pre-Enroll/Enrollment Checklist](#)
- [Member Enrollment Flow Chart](#)
- [Member Enrollment Presentation](#) (PDF)
- [Member Enrollment Webinar](#) (Recorded)



Exit

AmeriCorps requires programs to exit members electronically in eGrants/My AmeriCorps.

- **Exit...within 30 CALENDAR DAYS** of last day of service.

Well before this...programs should have completed “pre-work” ...

- Corrective Action Paperwork (if applicable)
- Documentation of Compelling Personal Circumstances (if applicable)
- Performance Reviews
- Final Timesheets
- Program Exit Paperwork



eGrants Exit

When program/member “pre-work” has been done, programs can finalize electronic “exit” ...

Within 30 CALENDAR DAYS of LAST DAY OF SERVICE

- 1) Program Unlocks Exit Form (if needed)
- 2) Member Fills Out Member Sections
- 3) Program Completes Program Sections

...the quicker a program exits a member, the quicker the member gets their education award (if so earned).



Records Retention

- Outlined in the Serve Washington Special Terms and Conditions
- Subgrantees are required to retain and maintain copies of all documentation associated with the grant in accordance to Washington State Law RCW 40.14.060, which requires official public records or office files and memoranda to be retained for a period of **six years** following the formal closeout of the **prime** Serve Washington grant. Because state law is more restrictive than the federal law, subgrantees of Serve Washington must retain records for the longer period of time.
- Serve Washington will provide a formal notice to each affected subgrantee when the closeout of a **prime** grant occurs. This notice will include which subgrant agreements are included and when to begin the retention period.



Chapter 4 – cont.

- ✓ **Member Orientation and Training**
- ✓ **Member Supervision**
- ✓ **Member Performance Reviews**
- ✓ **Conditions for Early Release**
- ✓ **Slot Management – Refill/Conversions/Transfers**



Take a break.
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Common Pitfalls



Common Pitfalls

In no particular order...

- Ineligible Staff/Members
- Late/Non-Compliant Criminal History Checks
- Late Enrollment
- Performing Prohibited Activities
- Failure to Track Staff/Member Hours
- Inaccurate Living Allowances
- Inaccurate/Ineligible Expenses Charge to Grant
- Under Matched



Chapters 5-6



Performance Management

- Ongoing spectrum with support from Serve WA
 - Theory of Change
 - Logic Models
 - Outputs/Outcomes/Measures
 - Evaluation
- Performance Improvement Plan (PIP)
 - Lou Thompson, Performance Management Analyst
 - End of Year 1 – Review
 - Deep Dive
 - TOC/LM
 - Data Collection
 - Years 2 & 3 – Ongoing Support
 - Forward Thinking & Strategies



Q&A



The End

