



# AmeriCorps Washington

## Planning Grants – Member/Site Development (IV)

May 12 – 10am

Please sign-in via the chat box:

- Organization/Program
- Name(s)
- What is your favorite (and maybe unique) pizza topping?

# Announcement(s)!

## WebEx

May 12

May 26

June 9

## Zoom

June 23



# Announcement(s)!

## Regional Meeting

Serve WA Subgrantee Gathering  
(tentative)

June 1, 10am-11am

Prior to Conference Kick-Off



# Announcement(s)!

## **On3Learn AmeriCorps e-Learning**

Built by AmeriCorps Alumni for AmeriCorps Programs

Courses for AmeriCorps Staff, Sites, Members

New all access pass for Planning Grants only \$500

Self-paced Learning during Gap Period

Allowable Grant Expense



# Learning To Date

## Previous Content

- AC 101/Locating/Reviewing/Reading AmeriCorps Guidance
- Theory of Change/Logic Models/Performance Measures/Data
- Member Benefits/Eligibility/Recruitment/Selection
- Prohibited Activities/Orientation/Training/Supervision
- Position Descriptions/MSA/Time Tracking

## Today's Agenda

- **Member/Site Development**
  - **Member Files**
  - **Enrollment/Exit/Slot Management**
  - **eGrants Tutorials**
  - **Member Performance Reviews**

## Next Up (*May 26*)

- Policies/Procedures & Volunteer Planning



# Questions to Consider

- How will the program ensure a diverse and inclusive AmeriCorps team?
- How will the program encourage esprit de corps among the AmeriCorps team?
- How will the program prepare AmeriCorps members for Life After AmeriCorps?
- If using host sites, what role will they have in member development?
- Are position descriptions free of prohibited activities and perception of “other duties?”
- How will the member service agreement be introduced (and signed on or before the first day of service)?
- Is the time tracking system paper or electronic? If electronic, does it meet AmeriCorps requirements?
- Does the program have a criminal history check policy that meets AmeriCorps requirements?
- Will members be allowed to teleserve? Does the teleservice policy meet AmeriCorps requirements?
- Is volunteer engagement a program component? What activities will volunteers be engaged in?
- **How does this new knowledge change the budget/match in order to run a successful program?**



# 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



# 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)





# 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

- **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**



# Pre-Enroll/Enroll Pitfalls

- **What are some common mistakes (human error) with enrollment?**
  - Poking applicants to complete their portion
  - Programs forgetting to enter NSCHC date box
  - Watching auto verification of eligibility (and submitting to AmeriCorps when returned for manual verification)
  - Allowing members to start/collect hours before pre-enrollment is complete (big NO)
  - Forgetting to complete final enrollment button once members start (will not back date more than 8 days)



# 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).



# Types of Early Exits

Only TWO types of early exits:

1) Release for Compelling Personal Circumstances

2) Release for Cause

- “cause” isn’t always negative, it encompasses anything that doesn’t fall under compelling



# Types of Early Exits

## Release for Compelling Personal Circumstances

- Performed satisfactorily
- Completed at least **15%** of term of service
- Meets the criteria in [45 CFR 2522.230](#)
  - Beyond participants control
  - Disability or serious injury
  - Disability, serious injury, or death of family member
  - Natural disaster
  - Strike, site closure
  - Relocations of spouse/family
  - Military obligations



# Types of Early Exits

## Release for Compelling Personal Circumstances

- Member receives pro-rated education award
- Program receives positive retention rate for member position
- Program may NOT refill positions exited with award
- Program may NOT release for CPC for:
  - Employment
  - School
  - General Dissatisfaction
- In rare cases, if the program design includes employment as the outcome, such as welfare to work, this may warrant CPC.



# Types of Early Exits

## **Document** Compelling Personal Circumstances

*...the program must document the basis for any determination that compelling personal circumstances prevent a participant from completing a term of service...*

At minimum:

- Member request (email, letter, etc.)
- Program support/corroborate (letter, note to file, etc.)
- Source documents (such as medical, military obligation, etc.)

**CAUTION!** Protect/Secure any personal records.



# Types of Early Exits

## Release for Cause

- Essentially any reason other than CPC
- Members are not eligible for pro-rated education award
- Member may still be given credit for satisfactory service (which allows the member to serve again)
- Program retention declines
- Program may refill member position in some cases



# Types of Early Exits

In general when new to program management, it is best to contact your Serve WA Program Officer to discuss early exits.

AmeriCorps also outlines its policy on release in the [AmeriCorps Terms and Conditions](#).





# Slot Management

## Slot Refills

- Must fill unfilled eGrants slots first
- Can only refill slots for members exited for cause
- Members must have been released prior to completing **30%**
- Must have adequate time to complete (set new member up for success)
- May not refill the same slot more than once

## Slot Conversions

- Unfilled and refill slots may be converted
- Conversions must be “Trust neutral”
- Conversions are not to be used in place of early exits



# Slot Management

In general when new to program management, it is best to contact your Serve WA Program Officer to discuss slot refills and slot conversions.

AmeriCorps also outlines its policy on release in the [AmeriCorps Terms and Conditions](#).



# 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.



# Member Performance Reviews

## Full-Time Members

- Mid-Term Review
- End-of-Term Review

## Part-Time Members

- End-of-Term Review

## Minimum Requirements

- Completed required number of hours?
- Satisfactorily completed assignments?
- Met program performance criteria?



# Questions?



# “Homework”

- *Continue reviewing and reading AmeriCorps guidance documents*
- *Continue developing ToC, LM, PMs, Data Plan, Host Sites, Strategic Partners, Member Benefit/Eligibility Systems, NSCHC Systems, Member/Site Recruitment*
- *Continue Member Orientation/Training/Supervision Plan (if using host sites, also develop for sites)*
- *Continue Position Descriptions/MSAs/Time Tracking (if using host sites, also develop for sites)*
- **Develop Member File Checklist/Process**
- **Develop Member Performance Review Process**
- **Update budget framework**



# Deliverables

- NSCHC Certificate/Vendor Set-Up/Staff “test” Checks
- Member Recruitment Plan
- Member Orientation/Training/Supervision Plan
- Member Position Description/Member Service Agreement

Submit to **Robyn** anytime (through end of May for all member/site deliverables) for general feedback.

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# Closing

