



## Ohio AmeriCorps: New Program Director and Staff Training

August 1-2, 2013  
Wi-Fi Username: dasgust  
Password: Online12  
#OHAmeriCorps

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## WELCOME!

- Welcome
- Introductions
- Review Agenda
- Housekeeping

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## Introduction to ServeOhio and National Service

Connecting to a National Network

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## Objectives

- **Gain a better understanding of national service;**
- **Learn about ServeOhio, Ohio's commission on service and volunteerism;**
- **Learn about resources available to help you and your members with their service.**

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## History of National Service

- **National Service has a long history in the United States.**
- **National Service has generally enjoyed bipartisan support in the United States.**
- **To learn more about the history of National Service, [go here](#).**
- **[www.nationalservice.gov](http://www.nationalservice.gov)**

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## A National Movement

- **Individuals from cultures, communities, and with different experiences and expectations are coming together to give a year (or more) of their life in service to others.**
- **AmeriCorps member experiences are transformative for themselves and those served.**
- **President Bill Clinton signs the National and Community Service Trust Act of 1993, creating AmeriCorps and the Corporation for National and Community Service to expand opportunities for Americans to serve their communities.**

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## Corporation for National & Community Service

- The mission of the Corporation for National and Community Service is to improve lives, strengthen communities, and foster civic engagement through service and volunteering.
- Led by Wendy Spencer, CEO and a Board of Directors, appointed by the President.
- To learn more about CNCS, [click here](#).

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## Edward M. Kennedy Serve America Act

- The 2009 Serve America Act has placed National Service and Volunteerism on a significant path of growth and impact.
- Introduces new provisions that will encourage greater numbers to serve, addressing the significant challenges faced by individuals and communities in the U.S.
- To learn more about the Edward M. Kennedy Serve America Act, [click here](#).

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## AmeriCorps National Service Programs

- AmeriCorps State & National
- AmeriCorps VISTA
- Senior Corps
  - Foster Grandparents
  - Retired Senior Volunteer Program (RSVP)
- National Civilian Conservation Corps (NCCC)

[Learn More](#)

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## ServeOhio, Ohio's commission on service and volunteerism

- ServeOhio was established in 1994 to administer Ohio AmeriCorps grants under the federal AmeriCorps program to promote and to promote volunteerism throughout the state.

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## Funding Relationship



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## About ServeOhio

- **Funding**
  - State GRF
  - CNCS
  - Leverage federal, state, and private dollars to operate and fund AmeriCorps State programs.
- ServeOhio's Board of Commissioners is made up of 13 appointees of the Governor and 8 state agency/legislative representatives.
  - The Board approves the annual operating budget, sets overall priorities in an annual work plan, and approves funding awarded to sub-grantees.
  - William Russell is the current Chair.

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## ServeOhio Objectives

- Administer the AmeriCorps State grant funded programs.
- Promote and encourage volunteer engagement through such initiatives as the National Days of Service.
- Recognize volunteerism through the Governor's Volunteer Awards.
- Convene and host the annual Ohio Conference on Volunteerism & Service.
- Encourage and develop strategies to engage individuals with disabilities.
- Develop and actively participate in partnerships that strengthen communities and expand volunteer participation.

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## Ohio AmeriCorps

- The 2013-2014 Ohio programs has over 600 AmeriCorps State members.
- In total, more than 1300 AmeriCorps members will be placed in Ohio through AmeriCorps State, AmeriCorps National, and AmeriCorps VISTA programs.
- AmeriCorps members in Ohio and across the country are focusing their service in the areas of education, health, environment, veterans, and economic opportunity.
- Current program directory may be found [here](#).

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- Ohio Commission on Service and Volunteerism (ServeOhio): [www.serveohio.org](http://www.serveohio.org)
- Corporation for National & Community Service: <http://www.nationalservice.gov/>
- History of National Service: [http://www.nationalservice.gov/about/role\\_impact/history\\_timeline.asp](http://www.nationalservice.gov/about/role_impact/history_timeline.asp)
- National Service in Ohio (descriptions of streams of service: <http://www.nationalservice.gov/about/programs/index.asp>)
- Edward M. Kennedy Serve America Act: <http://www.nationalservice.gov/about/serveamerica/index.asp>
- OnCorps: [www.americorpsoh.org](http://www.americorpsoh.org)
- Resource Center: <http://www.nationalserviceresources.org/>
- MyAmeriCorps Tutorial: <http://www.nationalserviceresources.org/my-ameri-corps-overview-tutorial>
- Segal Education Award: [http://encorps.nationalserviceresources.org/laa\\_award.php](http://encorps.nationalserviceresources.org/laa_award.php)
- EnCorps: <http://encorps.nationalserviceresources.org/index.php>

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## Resources

- [AmeriCorps Listserv](#)
- [National Service Knowledge Network](#) {nationalserviceresources.org}
- [Ohio AmeriCorps Program Director Resources](#) {www.serveohio.org/professional-development}

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## Provisions

2013 AmeriCorps Grant Provisions	2013-2014 Ohio AmeriCorps Supplementary Provisions
I. Legislative and Regulatory Authority II. Other Applicable Statutory and Administrative Provisions III. AmeriCorps Special Provisions IV. General Provisions V. Attachment	<ul style="list-style-type: none"> <li>• ServeOhio requirements that supplement 2013 CNCS provisions, unless otherwise noted</li> <li>• "In addition to..."</li> <li>• Failure to comply with <u>all</u> provisions is a consideration in any future request for funding continuation</li> </ul>

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## Member Prohibited Activities

- List of prohibited Activities required in the member contract and the host site agreements regulation 45 CFR § 2520.65
- Training for member and host site supervisors
- Directly or indirectly
- Non-AmeriCorps time vs. private time

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## Acknowledging Stakeholders and Sponsors in News Releases and Publications

- ✓ AmeriCorps
- ✓ “ServeOhio, Ohio’s commission on service and volunteerism...”
  - ✓ All following mentions: “ServeOhio.”
- ✓ Local Supporters as Recognized by the Host Sites
- ✓ CNCS

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## Media Outlets

- Newspapers
- Television
- Radio
- Social Media
- Newsletters and Publications
- Internet/Websites

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## Logos

- ServeOhio
- AmeriCorps
- Guidelines

Non-AmeriCorps staff should always ask ServeOhio permission to use ServeOhio logos.



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## Project Mentor

Logos: Special Thanks to our friends & sponsors, who made this exciting event possible!

**Over the Edge for Kids' Sake**

It's a bird, it's a plane... it's an Edge!!! Yes, we went Over the Edge for Kids' Sake on June 21, with Men's Golf Day on June 20. Thanks to all of our Sponsors who committed to raise \$1,000 to ensure a safe on the ropes. Thanks, too, to everyone who kept their feet on the ground and cheered them on. Our youth teams were well represented... Coach, Lisa Cook, Cree Carr and Stinger all directed a lot of attention while they descended!

**SPECIAL THANKS**

AmeriCorps Service Members make a huge difference for the kids we serve! Our special thanks go to ServeOhio, Ohio's commission on service and volunteerism, which identifies the grants that make this possible. Your praise of qualified and dedicated AmeriCorps for the Mentors completed their service with Project Mentor. Our sponsors and new Members will be joining soon. They'll be proud, inspired and sustaining exciting new members and valuable new volunteerism programs!

**CLICK LINKS**

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## At the Site

- AmeriCorps Logos, Signage and Clothing \* (required)
- Introduction of Stakeholders
- Testimonials
- Presentation
- Information Packet with Statistics (Elected official-specific, where possible)
- Photo Opportunities
- Action and Visuals
- “AmeriCorps Member for a Day”
- Sponsor Logos on Printed Materials

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## National Days of Service

- **Make A Difference Day** – October 26, 2013
- **9/11 Day** – September 11, 2013
- **Martin Luther King, Jr. Day of Service** – January 20, 2014
- **Global Youth Service Day** – April 11-13, 2014
- **AmeriCorps Week** – March or May 2014

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**LUNCH!**



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**AmeriCorps Sub-Grant**

**Financial & Grants Management  
2013-2014**



**GOAL**

**To Learn the Basic Financial and Grants Management Responsibilities of an AmeriCorps Sub-Grant Program**

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**AGENDA**

- Primary Documents: Your Responsibilities
- Financial Reporting: Periodic Expense Report
- Requesting Funds: The Payment Process
- Grants Financial Management
- Wrap Up / Q & A



**Primary Documents:  
Knowing Your Responsibilities**

- Provisions (Ohio and CNCS-see previous slides)
- Proposal (application)
- The Notice of Grant Award:
  - Grant Terms & Conditions
  - Approved Budget & Match Requirements

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**Notice of Grant Award (page 1)**

**Award Information:**

- Agreement Number
  - Grant Amount
  - CFDA Number (94.006)
  - Program Year (2013-14)
  - Grant Type (Competitive, Formula, Fixed)
- NEW** Project Start Date

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## Notice of Grant Award (page 1)

### Award Description:

**NEW** AmeriCorps members and Member Service Years (MSY)

FT	HT	QT	Total Slots	Total MSY
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### Special Conditions

- \*Minimum Match Requirement
- \*Voluntary Cost Share (budgeted match)

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## Notice of Grant Award (page 2)

### 2. Term of Award

This Award shall commence \_\_\_\_\_

### 3. Sub-Grantee Project Year

Begins on the Project Start Date and ends upon completion of all member terms of service

- Charges to grant start on the Project Start Date
- Grant funds cover Member Service Costs the entire Project Year
- Grant funds cover all other costs the first 12 months of the Project Year

### 4. Availability of Funds

Subgrantee may spend 99% of award; 1% is retained by ServeOhio

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## Sub-Grantee Project Year Spending

### Example – August Start Program

Sub-Grantee Project Year	8/1/13 – 7/31/2014
Member Support Costs	8/1/13 – completion of all member service terms
All Other Costs (1 <sup>st</sup> 12 months)	8/1/2013 – 7/31/2014 (covered by grant)
Grant Reconciliation	10/15/2014

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## Financial Reporting Forms Basic “rules” for all forms

- **Financial Reports** - submit in OnCorps and on-time
  - \*Late reports are recorded for consideration in grant renewal process
- **Payment Requests** - submit on OCSV RFF form (see [www.serveohio.org](http://www.serveohio.org)) through regular mail (no fax or email)
  - \*Typed, accurate and mathematically correct
  - \*Include an original signature

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## OnCorps

- OCSV initiates Sub-grantee/Program Director access
- Program Director assigns access for sub-grantee staff, members, host sites, etc.
- Submit Approved eGrants Budget in OnCorps
- Submit PERs and any Budget Modification Request(s) in OnCorps

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## Periodic Expense Report (PER)

- Shows federal and match expenditures according to budget category, by line item
- Shows match percentage being met
- Required Quarterly (see AmeriCorps Reporting Periods & Due Dates for schedule) and in conjunction with a Request for Funds
- First Report due in OnCorps 10/15/2013 for the period ending 9/30/2013

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Ohio Commission on Service and Volunteerism  
AmeriCorps Reporting Periods & Due Dates  
Grant Year: 2013-2014

Reporting Period	Reports Due	Due Date
Grant Start – 9/30/13	PER	10/15/2013
10/1/2013 – 12/31/2013	PR PER	1/15/2014
1/1/2014 – 3/31/2014	PR PER	4/8/2014 4/15/2014
4/1/2014 – 6/30/2014	PR PER	7/15/2014
7/1/2014 – 9/30/2014	PR PER	10/8/2014 10/15/2014

Annual Grant Reconciliation due 10/15/2014  
PR – Progress Report PER – Periodic Expense report

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Request for Funds (RFF)

- ✓ Contains “Financial Snapshot”
- ✓ May submit monthly (every 30 days)
- ✓ May draw funds one month in advance, as allowed by OMB Circulars
- ✓ Use form on our website at [www.serveohio.org](http://www.serveohio.org)

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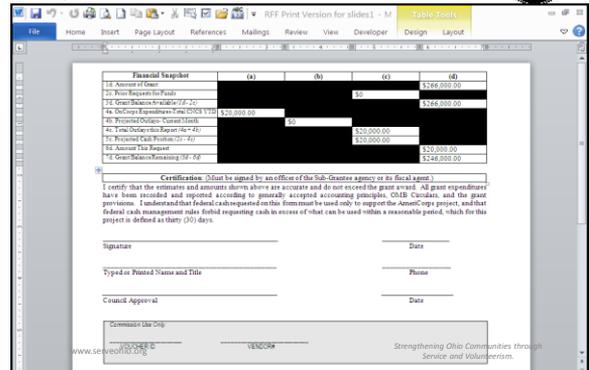


AmeriCorps Sub-Grant Program  
Request for Funds

Access form @ [www.serveohio.org](http://www.serveohio.org)

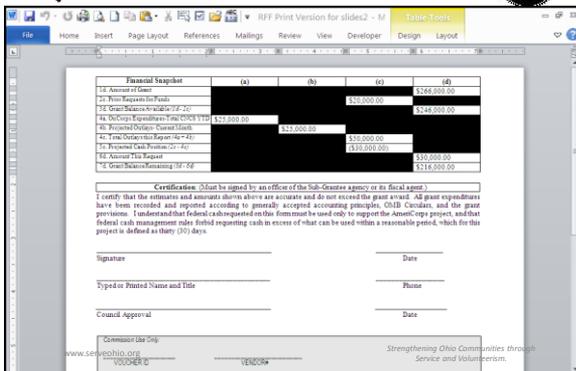
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\*OCSV Sub-Grantee Payment Process

Sub-grantee: Submits Request for Funds (RFF) to OCSV (and PER in OnCorps)

AmeriCorps Grants Officer: Reviews PER and Request, Approves payment, Updates internal spreadsheet, Enters request (creates voucher) in state accounting system

Director, Finance & Internal Operations: Reviews voucher, Verifies encumbered funds for grants, Authorizes payment Requests money from CNCS through electronic draw down

State Budget/Management Office: Processes payment, EFT direct deposited to appropriate bank account, Deposit verification mailed to Sub-grantee

\*The entire process, from receipt of sub-grantee request to issuance of EFT generally takes four weeks or less.

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## Grants Financial Management Where To Get More Information

### OMB Circulars — [www.whitehouse.gov/omb](http://www.whitehouse.gov/omb)

Federal standards to ensure grants are managed properly and funds spent in accordance with applicable laws and regulations.

	State & Local Governments	Educational Institutions	Nonprofit Organizations
Cost Principles	A-87	A-21	A-122
Administrative Requirements	A-102	A-110	A-110
Audit Principles <a href="http://www.serveohio.org">www.serveohio.org</a>	A-133	A-133	A-133 <i>Strengthening Ohio Communities through Service and Volunteerism.</i>



## Grants Financial Management Where To Get More Information

### Application Guidelines and Instructions — [www.americorps.gov](http://www.americorps.gov)

### Corporation for National and Community Service Regulations — [www.nationalservice.org](http://www.nationalservice.org)

### National and Community Service Act of 1990 — <http://www.csc.ca.gov/aboutus/files/nlsa1990.pdf>

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## Grants Financial Management Where To Get More Information

- Building a High Quality AmeriCorps Program**  
<http://www.nationalserviceresources.org/ac-startup>
- Learning Pathways for Program Start-Up**  
[http://s3.amazonaws.com/resource\\_center\\_video/taag/program-start-up/index.html](http://s3.amazonaws.com/resource_center_video/taag/program-start-up/index.html)
- Ohio Commission on Service and Volunteerism, AmeriCorps Fiscal Manual** [www.serveohio.org](http://www.serveohio.org)
- Future Trainings**
- OCSV AmeriCorps Grants Officer – Lisa Tope**  
[lisa.tope@serveohio.gov](mailto:lisa.tope@serveohio.gov), 614.728.2920

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## QUESTIONS

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## Finance & Grants Management

### GOAL

To identify the strengths and any areas of improvement needed to comply with the financial requirements of operating an effective AmeriCorps program.

- See: Learning Pathways for Program Start-Up at:  
[http://s3.amazonaws.com/resource\\_center\\_video/taag/program-start-up/index.html](http://s3.amazonaws.com/resource_center_video/taag/program-start-up/index.html)
- Also see **Building a High Quality AmeriCorps Program at:**  
<http://www.nationalserviceresources.org/ac-startup> (The following references are from this document, unless otherwise noted.)

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## Finance & Grants Management

- Your organization must abide by a set of requirements and policies once you accept federal money (see Required Documents, page 12).
- CNCS AmeriCorps Provisions
- Ohio AmeriCorps Supplementary Provisions
- OMB Circulars

**Compliance is not optional!**

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### Policy, Procedure and Regulation Compliance (p. 57)

- Consequences for non-compliance vary depending on the nature and severity of the non-compliance. For example, late reporting may result in a loss of funding or failure to document costs may result in having to repay funds.

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### Solid Financial Management (p. 115)

- All required financial systems, policies, procedures, and separation of duties are in place and followed.
- Consistent checks and balances are established and followed.

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### The organization's accounting system must:

- Be able to document and verify all costs – grant and match, cash and in-kind.
- Record financial transactions by budget line item and program year.
- Distinguish between federal and non-federal funds.
- Distinguish between match and grant funds – establish appropriate account numbers so both AmeriCorps federal funds and matching funds are reported separately in the accounting system.

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### The organization must:

- Regularly reconcile budget to actual expenditures, as required by OMB A-110 Circulars.
- Keep a clear audit trail that properly documents and records expenses.
- Retain thorough/complete documentation that supports all expenditures and in-kind matching funds.
- Retain time and activity reports that support staff time spent on the grant (and other activities if less than 100% AmeriCorps).
- Segregate financial responsibilities (proper internal controls).
- Maintain written policies and procedures.

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### Financial System Necessities (page 134)

- **Chart of Accounts**
- **Internal Controls**
- **Written Policies & Procedures**
- **Contractual Agreement Procedures**
- **Activity Reporting Documentation Requirements**

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### Financial System Necessities (page 134)

#### Chart of Accounts (COA)

Must have the ability to distinguish federal funds from all other organizational funding and must include matching funds. The COA should be representative of the general ledger.

#### Internal Controls

- An integral part of a sound financial management System (see pages 130-133 for Internal Controls Checklist).
- Include various methods to safeguard assets, ensure reliability of accounting data, ensure efficiency and confirm compliance with management policies and grant regulations.
- Are a set of procedures and cross checks that minimize misappropriation or misstatement of assets.
- Properly established internal controls leads to reliable financial reporting and compliance with laws and regulations.

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### Examples of good internal controls include:

- Documented policies and procedures
- Adequate review process for financial reports and budgets
- Adequate cash management procedures
- Monthly bank reconciliations
- An established financial system to track members' and employees' time and activities
- A system to follow-up on problems identified to ensure resolution
- Segregation of duties- the same employee should not authorize a purchase, sign the check and record the purchase in the accounting system; the same employee should not receive money, deposit the money and record the receipt in the accounting system.

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### Written Policies and Procedures Required by OMB A-110

An established and comprehensive set of **written policies and procedures** should be:

- ❖ reviewed annually to ensure they are up-to-date
- ❖ detail appropriate segregation of duties to ensure no one individual is responsible for the entire financial management and accounting system
- ❖ include detailed information on all financial management and accounting practices

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### Contractual Agreement Procedures

- Written **contractual agreement procedures** should be established to assist the organization when it enters into agreements with outside entities.
- Information relating to an award should be collected and summarized to ensure reporting requirements, grant compliance, and deliverables are clearly understood.
- The budget for the program should be entered into a tracking system and a review of the chart of accounts should be done to ensure all necessary accounts are in place.
- This procedure must be written and reviewed annually.

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### Activity Reporting Requirements

See OMB Circulars for your type of organization

**Documentation of Staff Time**  
(see [www.serveohio.org](http://www.serveohio.org) AmeriCorps Program Directors Resources Time and Attendance Report Sample)

- Signed time and attendance records must support salaries and wages charged to the grant or to matching funds for all employees regardless of position and by documented payrolls.
- Salaries and wages chargeable between this grant and other programs or functions must be supported by signed time and attendance records appropriately distributing the individual's time to the different programs or functions.

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### Staff Time and Attendance Records must:

- Account for the total activity of each employee and cannot account for time spent on AmeriCorps only, if less than 100%. (We recommend the report show total hours worked each day.)
- Be signed by the employee or the employee's supervisor and kept on file. (We recommend both sign.)
- Be completed after the fact.
- Be **based on actual, not budgeted** time. Organizations must show they are charging appropriate grants based on time and activity data, as opposed to charging grants based on budgeted time.
- Be prepared at least monthly, and coincide with one or more pay periods.

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### Documentation/Distribution of Member Time

- Sub-grantee must keep time and attendance records on all AmeriCorps members in order to document their eligibility for in-service and post-service benefits
- A living allowance is not a wage
- Not paid on an hourly basis
- Paid in regular increments, such as weekly, bi-weekly, monthly
- Payments should not fluctuate based on number of hours served in a particular time period
- **Payments can only be held if member is suspended**
- *Payments must cease when a member concludes a term of service.*

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## 2013-2014 AmeriCorps Provisions IV.G.1. Living Allowance Distribution

If a member serves all required hours and is permitted to conclude his or her term of service before the originally agreed upon end of term, the grantee may not provide a lump sum payment to the member. Similarly, if a member is selected after the program's start date, the grantee must provide regular living allowance payments from the member's start date and may not increase the member's living allowance incremental payment or provide a lump sum to make up any missed payments.

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## Member Living Allowance Distribution OCSV Guidance

- Set up Stipend Distribution Increments

2013-14 Member Living Allowance (FT)

Example:

1 member x 12 months @ \$1,008.33/month for  
a total **up to \$12,100**

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## Member Living Allowance Distribution OCSV Guidance

- If not written, write a policy, outlining your practice of distributing the living allowance for FT and less than FT members, including HT members serving in a FT capacity

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## Member Living Allowance Distribution OCSV Guidance

- Establish a policy for members who come on late or exit early. You should establish a written policy that is reasonable. For example, if a member comes on board within the first two weeks of the month, you might set policy that gives them the entire living allowance. If they start service later than that, you could prorate the amount based on the number of days (not hours) in the month they will serve. The same would hold true for the end of service. If they leave within the first two weeks of the month, their living allowance is based on the number of days in the month they served. If they serve over the 2-week cut-off, they would get the full living allowance. You can establish different cut-off points as long as they are reasonable, documented in policy, and followed consistently.

CNCS Policy Brief 2006

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## In-kind Contributions

(see [www.serveohio.org](http://www.serveohio.org) AmeriCorps Program Directors Resources In-Kind)

- Have the same documentation requirements as other expenditures.
- Documentation must be kept to support the value placed on the contribution.
- Documentation for staff hours must be clearly identified – a timesheet must be maintained that differentiates between AmeriCorps and non-AmeriCorps time, and tracks actual hours.

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## Potential Problems to Avoid (page 129)

- Timesheets
- Lack of Written Policies and Procedures
- Lack of Appropriate Documentation
  - Expenditures
  - Match
  - In-kind
  - Accounting Records
- Financial Reporting

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## Monitoring (Financial)

- PER – Quarterly
- On-Site Visit
- Desk Review
- Transaction Detail

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## On-Site Monitoring (Financial)

- Financial systems
- Grant and Match expenditures
- Matching in-kind contributions
- Financial reports
- Accounting policies and management procedures
- Internal controls
- Staff timesheets; member stipend distribution
- Exit discussion

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## Desk Review (Financial)

A Financial Monitoring Desk Review is conducted to verify compliance with AmeriCorps/Federal reporting requirements and involves the same documentation review as an On-site Financial Monitoring Review:

- Documentation of Staff Time
- In-kind Contributions
- Budget to Actual Spending
- Distribution of Member Stipend and Benefits Payments
- Accounting System Records that Support PER Reporting

Information is used to determine:

- T/TA needs
- Changes in a program's financial accounting systems, since last on-site visit
- Compliance with key Corporation AmeriCorps Financial Provisions
- Whether an on-site financial monitoring review of the sub-grantee is necessary for the current program year

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## Transaction Detail Review

- 12 month Planning Grants
- Review support documentation for selected costs from PER
- Review staff timesheets
- In-kind documentation, if applicable

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## Key Corporation AmeriCorps Provisions for Financial Compliance (2013-14) (Monitoring)

- Provision #IV.G – Living Allowances, Other In-Service Benefits and Taxes
- Provision #IV.I – Budget and Programmatic Changes
- Provision #IV.J – Reporting Requirements
- Provision #V.B – Financial Management Standards

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**BREAK!**

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## Compliance

A Monitoring Overview for Ohio  
AmeriCorps Programs

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## Purpose

ServeOhio conducts monitoring and review activities to ensure compliance with all grant provisions as well as to provide technical assistance to program development, implementation, and evaluation.



## Risk Based Monitoring Assessment

- **New operational and new planning grants are automatically assigned a level of high risk and monitored according to guidelines set forth.**
- **Program Self Assessment & Financial Management Survey are required.**
- **New programs may have limited information to provide on the Program Self Assessment Survey.**

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## Types of Monitoring

- **Documentation Review**
- **Site Visits**
- **Monitoring Visits**
- **Desk Reviews**



## Documentation Review Programmatic

- **OnCorps-Monthly**
- **eGrants-Monthly**

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## On-Site Monitoring Programmatic

- **At least 15% of the AmeriCorps member service files are reviewed.**
- **Reporting and tracking systems are reviewed.**
- **Sampling of required documents for programs are reviewed.**
- **Discussion with members.**
- **Discussion with board members or partners.**
- **On-site visit exit discussion.**



## Monitoring Follow-Up

- Sub-grantee provided a checklist which highlights the programmatic and financial results of the review.
- 5-30 days for correction, if there are findings.
- Feedback report will highlight the visit and provide any additional steps needed.
- Non-compliance status if not all requirements met.

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## Desk Review (Programmatic)

- A Desk Review may be conducted as a follow-up to an On-site Monitoring Review the previous year in which there were findings, as a result of scoring in the 'medium' risk category, or if periodic documentation reviews indicate some administrative issues.
- A Desk Review involves the same documentation review as an On-site Monitoring Review-15% of member file documentation, sampling of required documents, and review of reporting and tracking systems.
- Monitoring Follow-up of a Desk Review will follow the same steps as an On-site Monitoring Review-
- Sub-grantee will be provided a checklist that highlights the results of the review.
- 5-30 days for correction, if there are findings.
- Non-compliance status if not all requirements met.

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## Site Visit

- All programs will receive a monitoring visit and may receive a site visit.
- Purpose is to provide technical assistance, strengthen relationships and ensure progress towards goals.
- Meeting with program director/coordinator, visit to host site, interaction with AmeriCorps member(s) and/or service recipients.

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## Site Visit

- Follow-up letter will be provided within 30 days and include the following:
  - Program successes
  - Program challenges
  - Reflection on member direct service activities
  - Non-compliance issues

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## QUESTIONS

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## Member Management

- Train members on My AmeriCorps functions and OnCorps timesheets & reporting
- Train members on education award, living stipend, forbearance and interest accrual on qualified loans
- Train member on prohibited activities
- Program expectations

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## Member Enrollment/Refill Policy

- Required documentation prior to enrollment
- Assigning members to service locations
- 15 day requirement for eGrants and OnCorps
- 30% refill policy
- Prorated education award

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## Member Documentation

- Collect all eligibility documentation **prior** to member start
  - Copy of birth certificate or passport
  - Copy of driver's license or state id
  - Copy of SS card
  - Criminal background check FBI/BCI
  - NSOPW

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## Criminal Background Checks

- Ohio Commission Requirements
- CNCS Requirement
- <http://learning.nationalserviceresources.org/mo/d/page/view.php?id=3236>
- National Sex Offender Public Website  
<http://www.nsopw.gov/?AspxAutoDetectCookieSupport=1>

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## Validation

- SSN Validation Process (handout)
- Citizenship Validation (handout)

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## Member Documentation

- Member contract signed prior to member start
- Publicity released signed prior to member start
- W4 form prior to member start
- Election/Decline health care prior to member start

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## Member Timesheets

- Approval is required by the 15<sup>th</sup> of the following month
- Members are required to report on service activities
- Unless otherwise noted member hours should be approximately 40 hours a week or less
- Compliance officer completes a monthly check in OnCorps and eGrants

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## My AmeriCorps Overview

<https://www.nationalserviceresources.org/videos/my-ameri-corps-overview-tutorial>

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## Member Recruitment My AmeriCorps

- <https://www.nationalserviceresources.org/videos/member-recruitment-state>

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## Member Enrollment My AmeriCorps

- <https://www.nationalserviceresources.org/videos/member-enrollment-state>

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## Program Management My AmeriCorps

- <https://www.nationalserviceresources.org/videos/program-management-tutorial-state>

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## Member Management My AmeriCorps

- <https://www.nationalserviceresources.org/videos/member-management-state>

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## OnCorps

- <http://americorpsoh.org/>

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## Intentional Service Inclusion

- The **active, intentional** engagement of people with disabilities as members and volunteers in all levels of National and Community Service.
- Partners: AmeriCorps programs across Ohio and ServeOhio, Ohio Rehabilitation Services Commission, The Ohio State University Nisonger Center, Easter Seals and other disability organizations in Ohio.

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"No Wheelchairs Beyond this Point," 1970s



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Wheelchair at impassable curb, 1970s



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## Disability

- **Disability – As defined by the Americans with Disabilities Act 1990:** (a) a physical or mental impairment that substantially limits one or more of the major life activities of an individual, (b) a record of such impairment, (c) or being regarded as having such impairment
- Most disabilities are not apparent. Examples of "hidden disabilities" include mental health disorders, epilepsy, asthma, and learning disabilities.

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## Disability

Sign: "I have evolved past the need for legs", 2010



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Public service ad, 1980s



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## Inclusion

- [ServeOhio Inclusion Resources](#) - Determining Accessibility in Your National Service Program checklist, PowerPoints for trainings, Quick Primer on Disability Law for Grantees, and contact information.
- [CNCS Regulations](#)
- [Service and Inclusion](#)

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## Accommodations

- Effective accommodations remove a workplace barrier and provide equal opportunity to:
  - apply for a position
  - perform the essential functions of a position
  - to gain equal access to a benefit or privilege of employment

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## Accommodations

Woman typing with feet, early 1900s



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Hearing trumpet, 19th century



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## Accommodation Process

- Accommodations can include:
  - Modifying work schedules
  - Reassigning marginal job duties
  - Linking members/volunteers with disabilities with “natural supports”
  - Software programs such as screen readers
  - Making existing facilities accessible to persons with disabilities

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## Accommodations

- Accommodations are made to level the field, not to give special treatment;
- Members and volunteers with disabilities are held to the same performance and conduct standards as all members and volunteers;
- The accommodation process usually only requires open dialogue, flexibility, and creativity from all parties involved.

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## Accommodations

- You are required to provide reasonable, not *unreasonable*, accommodations
- More than half of reasonable accommodations cost nothing at all

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## Disclosure of Disability

- A member or volunteer may disclose a disability
  - To request an accommodation
- A specific diagnosis is *not* required, although supervisors may request documentation from a physician indicating the need for an accommodation
  - To alert supervisors to a potential/future need for accommodation
  - To demonstrate personal abilities and adaptability

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## When Should a Member Disclose?

- Early disclosure is recommended in order to give members/volunteers and their supervisors ample time to identify any accommodations that may make the service experience more successful
- A member or volunteer may disclose at any time; however disclosing a disability during a disciplinary meeting does not exempt the member from any disciplinary action that was to be taken
- No one is required to disclose a disability

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## Encourage Disclosure

- Express acceptance of *and* enthusiasm for differences
  - Participate in awareness training and education
  - Use “Inclusion Statements” on all program materials
- Sample: *“Program ABC is committed to the inclusion of members and volunteers with all levels of ability. Anyone who may need an accommodation based on the impact of a disability should contact Mr. Accommodation at [phone/TTY, email address] privately to discuss your specific needs.”*

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## Closing

Final Thoughts and Questions  
See you tomorrow at 9AM!



## Day 2: Recap and Questions so Far

Friday, August 2, 2013  
9AM - Noon

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## Performance Measurements: Tracking and Reporting Progress



## Theory of Change

- Community Need
-  Service Activity
  - Design (who does what with whom?)
  - Frequency (how many sessions a week?)
  - Intensity (length of each session)
  - Duration (how many total weeks of sessions)
-  Expected Outcome
- *If this activity occurs, this will be the result*

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## Performance Measures

- Develop performance measure to report on the Theory of Change
- [National Service Knowledge Network](#)
  - [Overview of PM PowerPoint](#)



## Basic Definitions

- **Intervention = Service Activity** conducted by CNCS-supported organizations or National Service Participants
  - Where, how often, when, with whom
- **Outputs = Amount of service provided** (people served, products created, or programs developed)

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- **Outcomes = Reflect the changes or benefits to occur**
  - Can reflect changes in individuals, organizations, communities, or the environment
  - Address changes in attitudes/beliefs, knowledge/skills, behavior, or conditions

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- Outcomes regarding attitude and belief involve a change in thought or feeling. For example, a caregiver feels she has more social support after receiving respite services.
- Outcomes measuring knowledge and skill involve a change in understanding or ability - what a person learns. For example, a student improves reading ability after attending tutoring.

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- Outcomes addressing behavior involve changes in actions, such as conduct or habits, often in a specific context. For example, a student improves class participation, according to teachers, after participating in a school mentoring program.
- Outcomes regarding condition involve a change in situation or circumstance. For example, a family is transitioned into safe, affordable housing after receiving referrals and counseling; or a community receives a new after-school program because a youth organization has been able to build its capacity to provide services.

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- **Performance Measure = One Output with an aligned Outcome**
  - Outputs are the amount (number, unit) of service provided.
  - Outcomes are changes that occur for individuals, communities, organizations, or the environment. Include changes in attitude and beliefs, knowledge/skills, behavior, condition
- [Tutorial on Performance Measurement](#)

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## Member Support

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## Esprit de Corps:

- A common spirit of comradeship, enthusiasm, and devotion to the program among the members.
- The spirit of AmeriCorps emphasizes a commitment to operation as a team.
- Cooperation, mutual support; open and direct communication, a positive attitude, good humor, accountability, and compassion for the children and youth.

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## Esprit de Corps:

- Members should be enthusiastic about the AmeriCorps ideals as well as being committed to making a contribution to the community through service.

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## Esprit de Corps Best Practices

- Ask members regularly if they have needs, fresh ideas, problems, or concerns.
- Tie community action, projects, media events and publications with member recognition.
- Justice Talking

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## Justice Talking

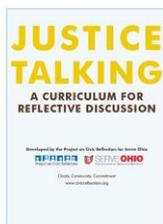
- Reading and discussion program for members featuring discussions that use short philosophical and literary texts, images, videos and news articles on the nature of justice, service, and related themes.
- Partnership with Ohio Humanities Council

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## Justice Talking: Ohio Curriculum



1. LEADERSHIP AND RESPONSIBILITY
2. SERVING
3. POVERTY AND NEED
4. DIVERSITY AND DIFFERENCE
5. JUSTICE AND EQUALITY
6. IDENTITY AND COMMUNITY
7. MOTIVES AND VALUES
8. CHANGE

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## Justice Talking

- Week of September 23<sup>rd</sup>, 2013 in Columbus, Ohio
- Train-the-Trainer: Member Profile
  - First-Year, if possible
  - Good Listener
  - Articulate
  - Willingness to devote extra time
  - Strong facilitator to avoid dissention
- Monthly meetings

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## Justice Talking: Positive Results

- “Recharged leadership”
- “Builds relationships among members”
- “Improved member development!”
- “Retention”
- “Improved and innovative curriculum.”

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## Justice Talking: Ways to Improve

- Conference calls do not have the same effect and prevent member cohesiveness
- Do not schedule on Sunday evenings!
- Scheduling is difficult
- Offer relief to the trained member

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## Final Thoughts?

Questions and Upcoming Events  
**Thank you for coming!**

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