

# Core Elements of Effective Program Oversight

Jennifer Cowart



# Outcomes

- Understand the key components of a strong oversight process
- Refine and/or create systems to ensure site, member and program compliance
- Assess current oversight processes and practices

# Agenda

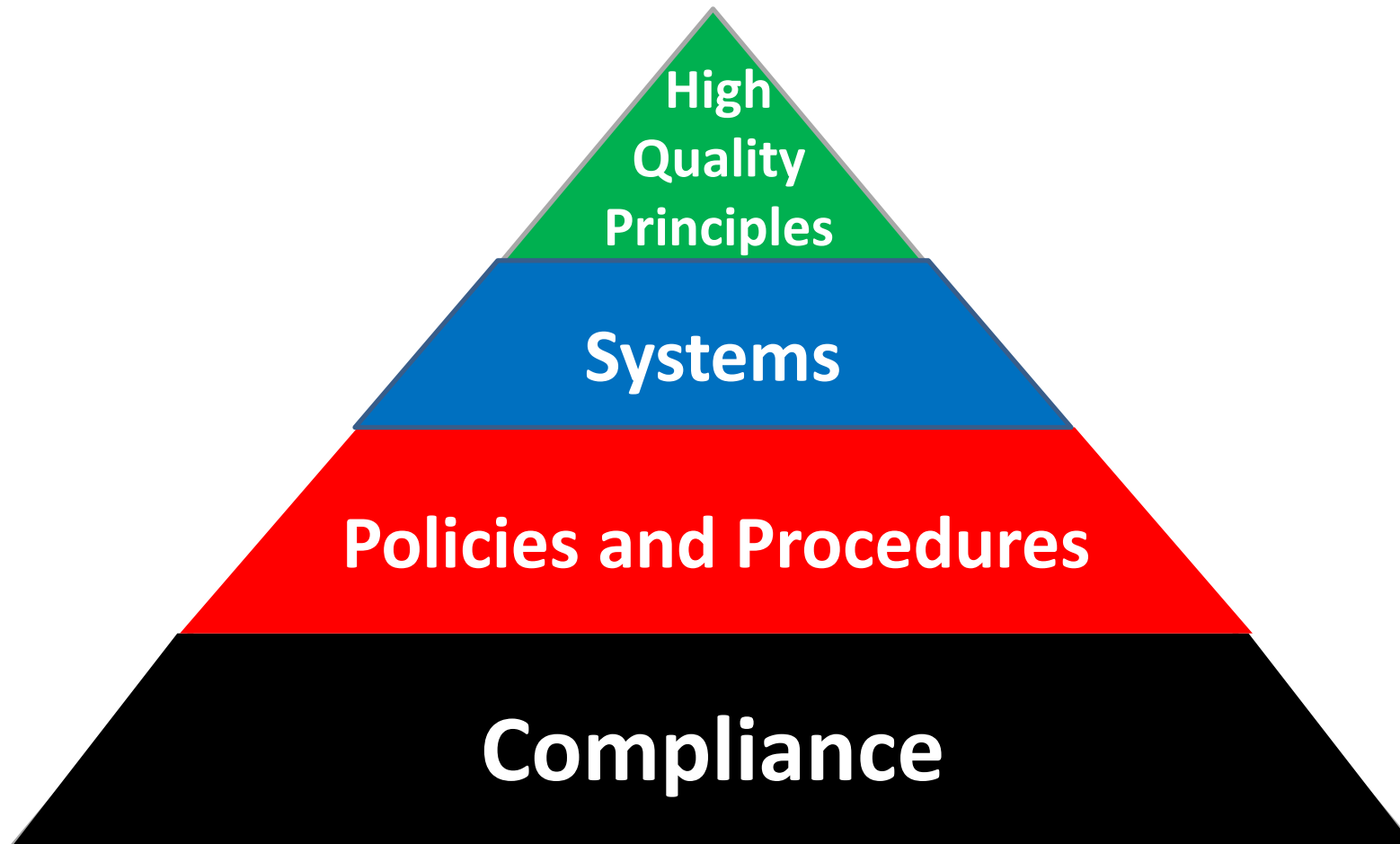
- Building the Learning Environment
- Current Context
- Oversight Process
- Program Assessment

# You need to know . . .

The information in this training is based on CNCS and Federal laws, rules, and regulations; CNCS grant terms and conditions; and generally accepted principles and practices.

CNCS and/or your State Commission may impose  
additional or varied requirements.

# Program Hierarchy of Needs

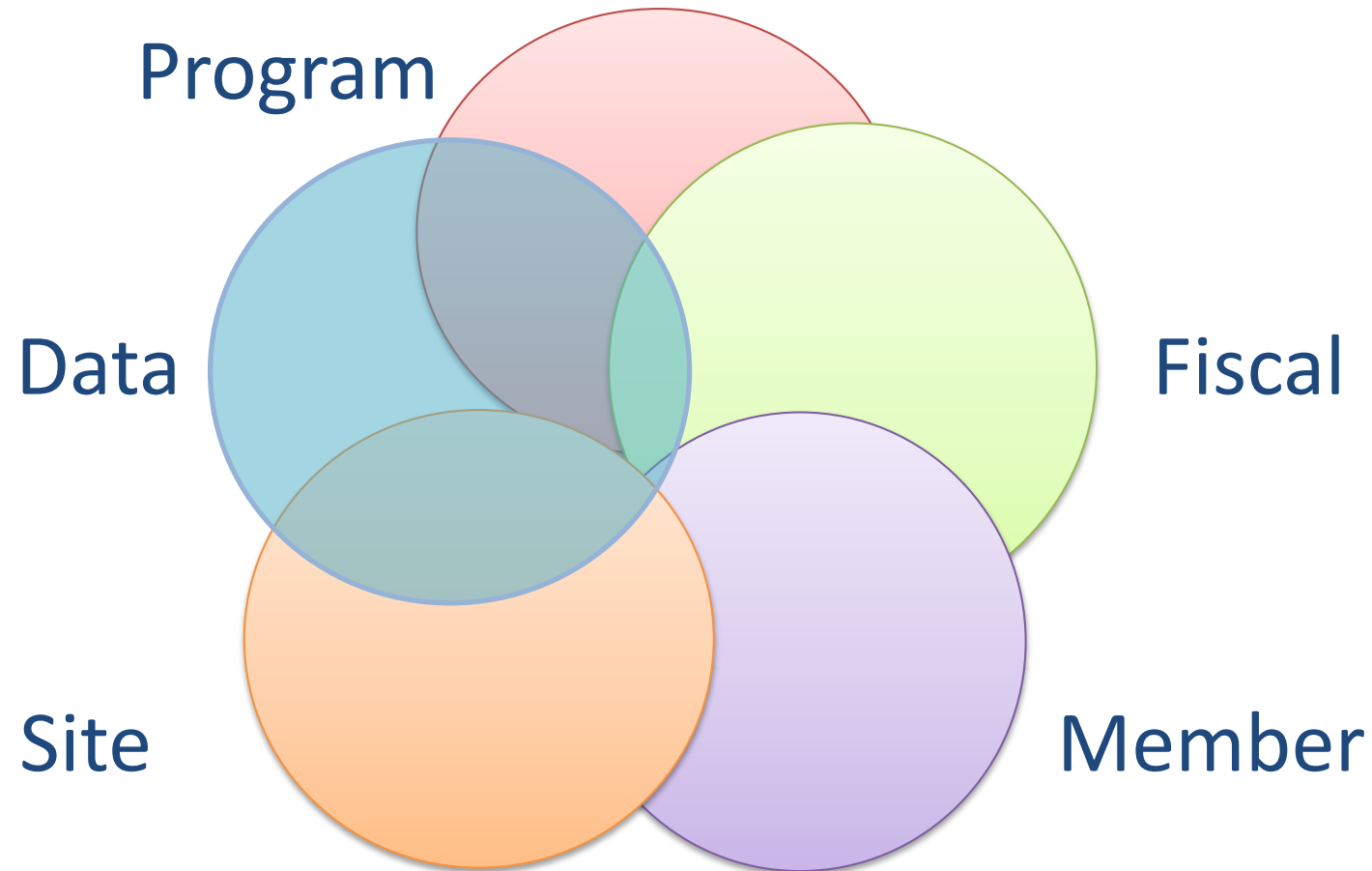


# Current Context

- Focus on Compliance
- Focus on Retention
  - Whether it is a requirement or because your partners and organization depend upon the ability to have someone for a minimum of one year
  - Emphasis on a high retention rate
- Focus on Recruitment
  - Member Service Years – 100% recruitment rate
- Increased Emphasis on Impact
  - Have to recruit the right members for the right positions so that you get the most impact for the dollars you receive
- Scrutinized Federal Dollars and Increased Competition

AmeriCorps Advantage: CaliforniaVolunteers 2017 Grantee Training Conference

# Management Cycles



# Core Elements of Effective Program Oversight

1. Annual Review of Key Documents
2. Strong Program Design and Aligned Measures
3. Extensive, Regular, and Impactful Site, Member and Staff Training
4. Detailed Member Position Descriptions, Member Service Agreements, and Site Agreements
5. Regular and Thorough Monitoring Procedures and Systems
6. Frequent Communication with staff, sites, members and State Commission



# Annual Review of Key Documents

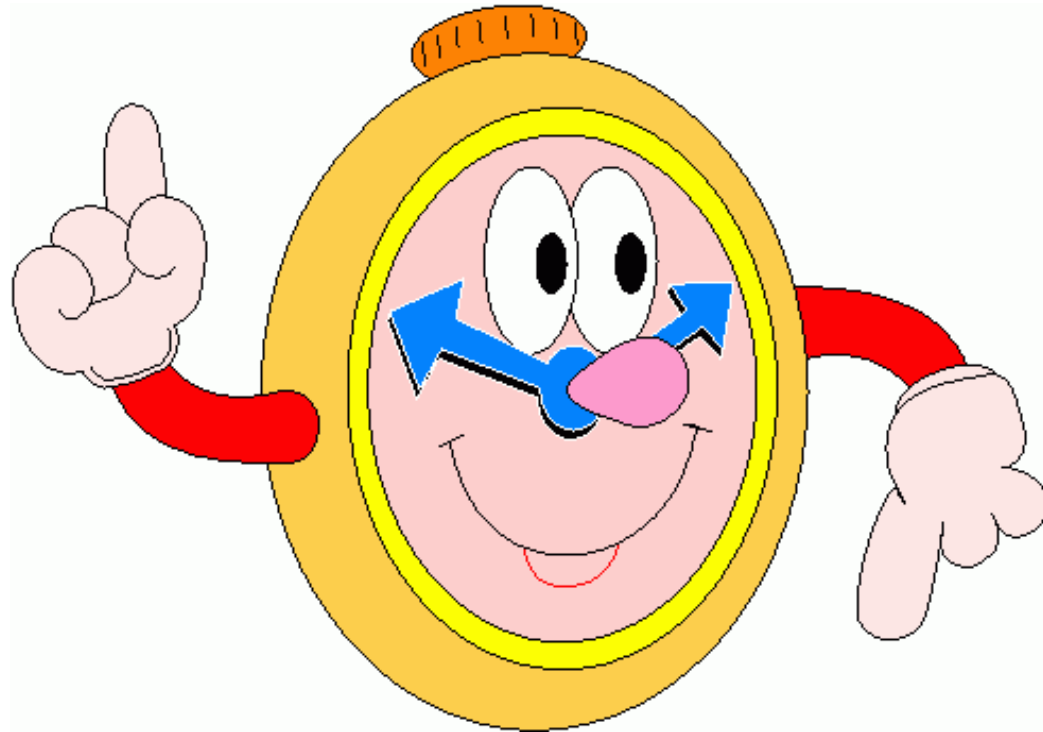


- Easy to get complacent
- Important to set aside time to review key documents and make changes

# Poll

I have read the  
CaliforniaVolunteers  
contract and exhibits for  
this year?





# Activity Time!!

# Poll

Our program collects  
and reviews data on  
applicant interview  
scores?



# Interview Rating Form

**2. Initiative (Question 6 & 7)**

Ability to show initiative in previous workplace settings.

1 2 3 4 5

**3. Dedication (Question 8 & 9)**

Ability to show commitment to a project.

1 2 3 4 5

**4. Maturity (Question 10 & 11)**

Ability to show maturity in a workplace setting.

1 2 3 4 5

**5. Teamwork (Questions 12 & 13)**

Ability to show an understanding of teamwork skills.

1 2 3 4 5

**6. Working with “at-risk” Youth (Questions 14 & 15)**

Awareness of educational issues and ability to adapt leadership in different situations.

1 2 3 4 5

**7. Problem Solving Skills (Questions 16 - 18)**

Ability to problem solve and operate in various situations.

1 2 3 4 5

**8. Boundaries (Question 19 & 20)**

Ability to maintain a distinction between personal and school appropriate relationships.

1 2 3 4 5

# Interview Analysis

Last Name	First Name	Initiative	Dedication	Maturity	Teamwork	Working with "at-risk" youth	Problem Solving Skills	Boundaries	Total Interview Score	Offered	Accepted	Completed
Bueller	Ferris	5	4	3	5	4	4	5	30	Yes	Yes	Yes
Explorer	Dora	4	3	4	4	3	2	4	24	No	N/A	N/A
America	Captain	4	5	4	5	2	3	3	26	Yes	Yes	No
Woman	Wonder	3	3	4	5	4	3	3	25	Yes	Yes	Yes
Average		4	3.75	3.75	4.75	3.25	3	3.75				

# Application Overview

Year	No. of Applicants	No. of Interviews Scheduled	No. of Interviews Conducted											No. Accepted	% Applicants Accepted	% Interviewed Accepted	Avg. Accepted Interview Score
			Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Total				
2015-2016	283	116				42	12	20	7	22	10	3	116	85	30.04	73.28	54.35
2016-2017	231	138			4	43	23	10	13	26	11	8	138	100	43.29	72.46	53.75

# Staff Transition Summary

## Outline

### 1. Key Contacts and Relationships

- Up-to-date list of key internal and external stakeholders (funders, board members, staff members, partner organizations, key collaborations, membership groups, vendors, etc.).
- Communication plan on who should be contacted during a transition, including when and why.

### 2. Timeline/Calendar

- A calendar of events and anticipated activities (internal and external) for the upcoming 12-18 months.

# Strong Program Design and Aligned Performance Measures

- Vision understood by all
- Stakeholders/partners involved in program design
- Member service and performance measures aligned with vision, mission and goals





# Stakeholders

- Analyze which areas each of your stakeholders are involved in
- Where else can they take a role and what is that role?



# Performance Measure Instructions

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# Performance Measure Instructions

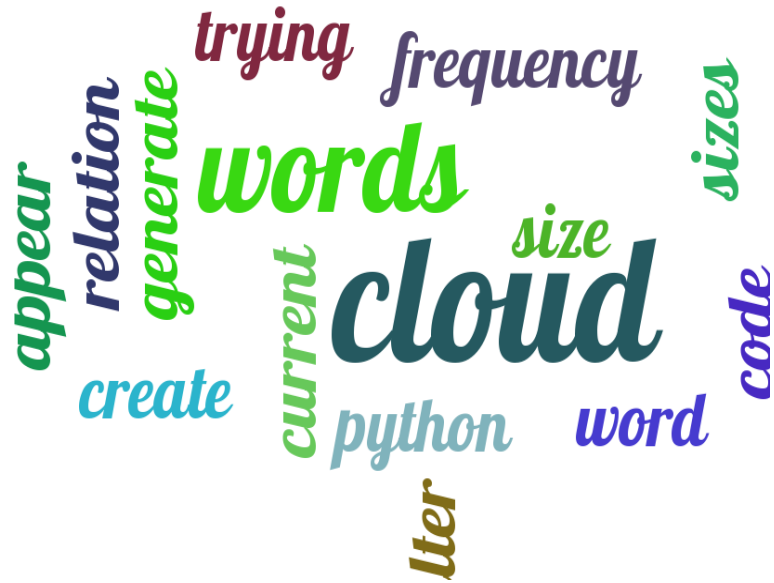
## CV Performance Measurement Worksheets Checklist

**Instructions:** Use this checklist to assess the Primary and Non-Primary Performance Measures (not the Common Strengthening Communities and Common Member Development measures). Please note any clarification in the box at the end of the checklist.

Criteria	Does Not Meet	Needs Improvement	Meets	N/A
<b>Alignment with Narrative/TOC</b>				
Focus areas, interventions, outputs and outcomes are consistent with the application narrative, logic model and theory of change.				
<b>Interventions</b>				
The interventions described contribute directly to the outputs and outcomes.				
Interventions are not repeated in multiple performance measures.				
<b>Dosage</b>				
The dosage (frequency, intensity, duration of intervention) is described and is sufficient to achieve outcomes.				
<b>Resource Allocation</b>				
MSY and member allocation are consistent with the member activities/time spent on member activities described in the application narrative and Amount of Service row.				
MSY is completely allocated across all performance measures.				
<b>Selection Rules/Performance Measure Instructions</b>				
The applicant has at least 1 aligned output and outcome for the primary performance measure.				
National Performance Measures conform to selection rules, definitions and data collection requirements specified in the Performance Measure Instructions. (Compliance with definitions and data collection requirements must be clearly explained in the Instrument section or must be clarified.)				
It is clear that beneficiaries are not double-counted in an aligned performance measure.				
National Performance Measures count beneficiaries, not AmeriCorps members, unless the measure specifies that national service participants are to be counted.				
The population counted in each National Performance Measure is the population specified in the Performance Measure Instructions.				
Applicant is not using applicant-determined member development or volunteer generation measures that are the same or similar to National Performance Measures or Grantee Progress Report demographic indicators (e.g., number of volunteers.)				
<b>Alignment &amp; Quality</b>				
Applicant-determined outputs and outcomes are aligned correctly.				
Outputs and outcomes clearly identify what is counted.				
Each output or outcome counts only one thing (except certain National Performance Measures).				
Outcomes clearly identify a change in knowledge, attitude, behavior or condition. (Counts that do not measure a change are outputs and must be labeled as such.)				
Outcomes clearly specify the level of improvement necessary to be counted as "improved" and it is clear why this level of improvement is significant for the beneficiary population served.				
Outcomes count individual level gains, not average gains for the population served.				
Outcomes measure meaningful/significant changes and are aligned with the applicant's theory of change. (Note: Outcomes that do not measure significant changes in knowledge, attitude, behavior or condition should be revised. If the applicant is not able to propose a meaningful outcome, the aligned performance measure should be removed. CNCS prefers that applicants				

# Word Cloud

What do you think of when  
you hear the phrase  
extensive, regular and  
impactful site, member and  
staff training?



# Extensive, Regular and Impactful Site, Member and Staff Training

- Focuses on the heart of the program
- Increases likelihood of a strong member experience and member, site and staff retention





# Member Training Plan

## Member Training Plan

### Pre-Service Retreat

- Agency Background
- AmeriCorps Documents
- Timesheet Training
- National Service Training
- Program Expectations
- Low Ropes Team Building

### Pre-Service Orientation

- What is mentoring/confidentiality?
- Boundaries
- Supervision
- First Month on Campus
- What to do in a crisis?
- Returning member Panel
- Risky Behaviors - Middle School Confessions Video
- Communication Self-Assessment
- Paperwork Refreshers/Timesheet questions
- Self-Care
- Tutoring/Mentoring Activities
- Cultural Competency

### Monthly Resource Days

- All training days include member support time and member share fair.

### October

- Agency Database Training
- Bullying
- Gangs

### November

- Service-Learning Project
- Thanksgiving All-Staff – sessions vary based on all-staff planning committee decisions

### December

- Compassion Fatigue
- Persistence and Grit
- Team building - White Elephant Gift Exchange

### January

- Life After AmeriCorps

### February

- Client Termination – Healthy Goodbyes



## Member Training Plan

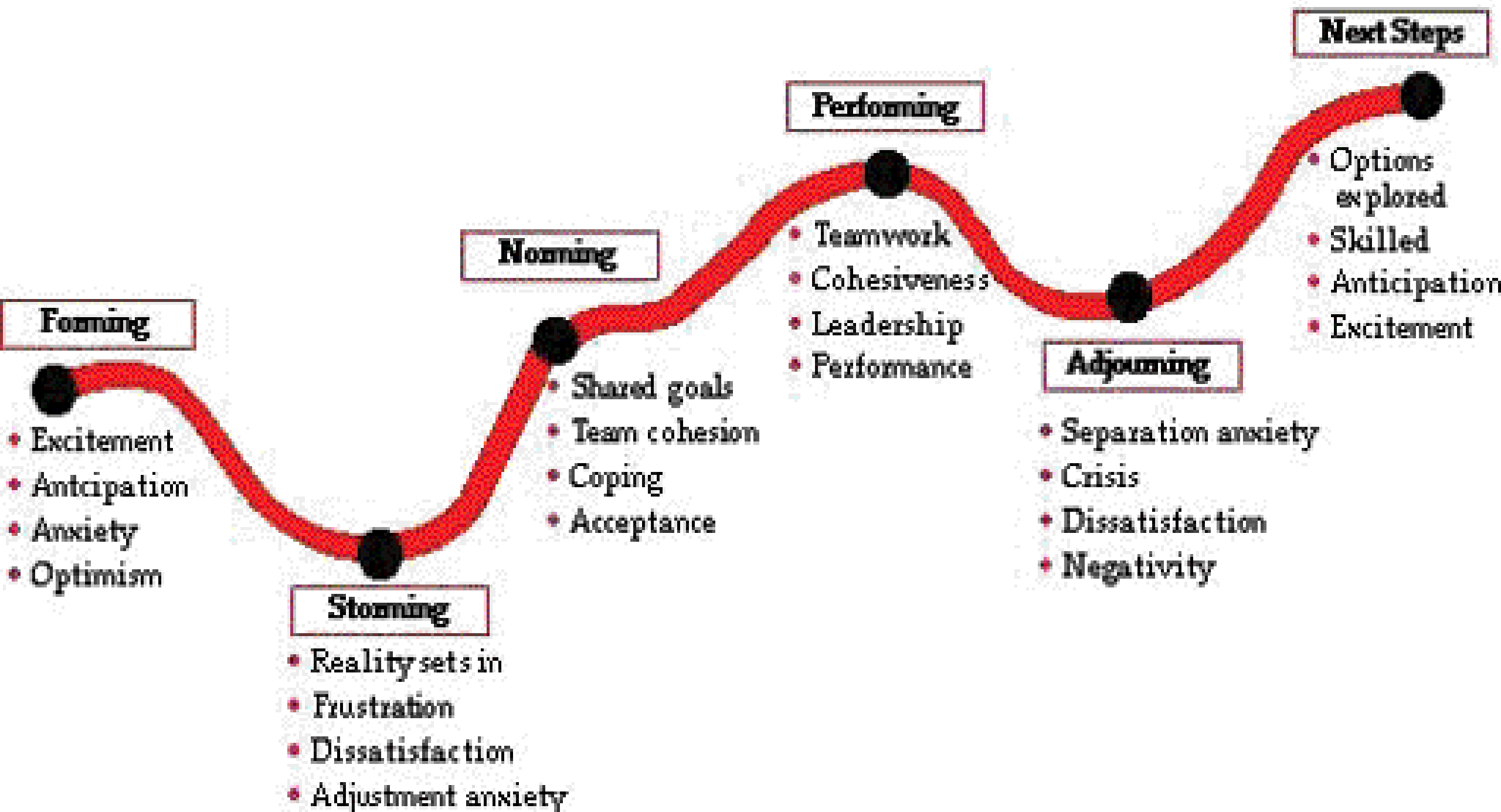
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Member Name: \_\_\_\_\_ Site Name: \_\_\_\_\_ WSC Program Coordinator: \_\_\_\_\_

**Instructions:** The project supervisor must provide or arrange for and track training to ensure members achieve the competencies noted below. The project supervisor and member will use this Training Plan to track the completion of required training, noting the dates and training completed. The training plan should be kept on site with the member file. The Washington Service Corps may ask for the progress on member training during progress reports, member performance evaluations and during annual monitoring visits.

### WSC Individual Placement Required Core Training

	Competencies	Name of Trainer and Curriculum	Date Completed
<b>AmeriCorps Affiliation &amp; Program Orientation</b>	<ol style="list-style-type: none"><li>1. Demonstrate knowledge of the structure of AmeriCorps and other national service programs and understand where they belong in the large national movement.</li><li>2. Properly introduce themselves and their program as well as describe their role as an AmeriCorps member.</li><li>3. Articulate and model a definition of ethic of service including how service is different than a job.</li><li>4. Demonstrate knowledge of the goals and objectives of their programs.</li></ol>		
<b>Cultural Awareness</b>	<ol style="list-style-type: none"><li>1. Know and recognize the components of cultural competency.</li><li>2. Treat others with respect, trust and dignity.</li><li>3. Be aware and be respectful in the communities they serve.</li><li>4. Self-evaluate their knowledge of cultural/diversity issues.</li><li>5. Effectively serve and interact with people from diverse backgrounds.</li></ol>		





# Forming

- Learning mode
- Determining place in the program
- What this national service and AmeriCorps thing is about
- Learning what is expected of them
- Much of what is told to them is often not heard
- Anxiety, mixed with excitement
- Often feel overwhelmed

# Norming

- Soon after your program year begins
- Ready to learn more about their role, both individually and as a team
- Members are forming well as a group
- Establishing their commitment
- Discovering how things will happen
- Learning about expectations and how things work

# Storming

- At some point in the year
- Members will experience dissatisfaction, disappointment, or challenges/obstacles
- Conflict can arise in both one on one relationships or within a larger team
- Where retention can be affected
- Might ask themselves “why did I make this commitment”; “am I really set out for this work”; “ can I really make a difference”; “am I valued” or “do I really feel passionate about this program”

# Performing

- Members are performing at a fairly high level, both individually and as a team
- Service is moving along smoothly
- Working towards the results they are required to accomplish
- Challenging themselves and others
- Feel a sense of ownership - program, site, and people/community they serve
- Seek further leadership opportunities and find themselves taking risks
- Having fun

# Adjourning

- Last few months of the program year
- Begin to feel a mix of emotions
- Looking forward to the future
- Also a time where they are reflecting on all they have been through and all the people with whom they have had the great opportunity to serve
- Time of joy and a time of sadness.

# Member Training Plan

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# Site Orientation Checklist



## XYZ AmeriCorps Site Orientation Checklist

Member Name: \_\_\_\_\_ Site: \_\_\_\_\_

Member Name: \_\_\_\_\_ Member Name: \_\_\_\_\_

Please note this form must be turned in to the AmeriCorps office by Tuesday, October 7<sup>th</sup>.

### Welcome, Introductions, Check In Icebreaker

- ☐ How are you feeling about being with AmeriCorps and XYZ?
- ☐ What has your experience been like so far?
- ☐ Any worries or concerns?
- ☐ Why did you join AmeriCorps?
- ☐ Site Supervisor share why they work for XYZ . . .
- ☐ What are your expectations for today?
- ☐ Site Supervisor share their expectations for today . . .
- ☐ What are your expectations for this year?
- ☐ Site Supervisor share their expectations for this year . . .
- ☐ What are you most looking forward to?

### XYZ Site Program History

- ☐ How long has XYZ been on this site?
- ☐ Review of XYZ goals and activities on the campus
- ☐ Our role in being a guest in a host environment, our relationships with teachers and administrators, we follow all school rules, appropriate dress code (no shorts, no shirts with slogans, no bare midriffs, no low cut pants, no spaghetti straps, no braless etc.)
- ☐ What kind of things do you enjoy doing that we might be able to build into your service?
- ☐ Site Supervisor share their ideas about what the AmeriCorps member can do on their campus.

### Supervision

- ☐ Site Supervisor shares their style of supervision
- ☐ AmeriCorps member shares an example of their most supportive experience with a supervisor and their least supportive experience with a supervisor
- ☐ Discuss what supervision will look like and when and how it will happen (individual and group)
- ☐ Go over the individual supervision guide together
- ☐ Go over the format of team meetings or group supervision
- ☐ Discuss expectations for timeliness, calling in late/sick, emergency etc.
- ☐ Discuss their system for time management \*\* Write in schedule, group meeting times, individual supervision times, school holidays, testing dates, timesheet due dates, AmeriCorps training dates
- ☐ Discuss process for turning in documentation to AmeriCorps (Timesheets, Evaluations, etc)

### Tour of XYZ space

- ☐ Desk space, supplies, bathrooms, lunches, keys, alarm systems
- ☐ Computer Use (NO checking personal e-mail, NO chat rooms, you must regularly check your XYZ e-mail account, Service related use of the computer only)
- ☐ Answering the phone and taking phone messages (Specify how you want them to answer the phone and take messages)
- ☐ Communication systems between XYZ staff, volunteers, teachers etc. (i.e: location of phone and room lists, volunteer sign in)



**Member Name:** \_\_\_\_\_ **Campus:** \_\_\_\_\_

**Please note this form must be turned in to the AmeriCorps office by October 7<sup>th</sup>, 2015.**  
The below expectations are the established guidelines for your assigned XYZ service site.

1. Dress Code - \_\_\_\_\_  
\_\_\_\_\_

2. Telephone Etiquette - \_\_\_\_\_  
\_\_\_\_\_

3. Tardiness/Absences - \_\_\_\_\_  
\_\_\_\_\_

4. Member service schedule (Start and End Times & Days Scheduled ) Expectation –  
**45-46 hours/week for Full-Time Members**  
**24-25 hours/week for Part-Time Members**

	Monday	Tuesday	Wednesday	Thursday	Friday	Expected Total Hours
Start						
End						

5. Student scheduling - \_\_\_\_\_  
\_\_\_\_\_

6. Service Logs/Data Entry - \_\_\_\_\_  
\_\_\_\_\_

7. Supervision Expectations - \_\_\_\_\_  
\_\_\_\_\_

8. Student crisis when supervisor is off-site – \_\_\_\_\_  
\_\_\_\_\_

9. Downtime - \_\_\_\_\_  
\_\_\_\_\_

# Site Expectations



# 2015-2016 AmeriCorps



## AmeriCorps FT & PT Paperwork Calendar



Monthly paperwork requiring physical signature(s) may be turned in at level meetings via your Site Supervisor.

\*Requires physical signatures in BLUE ink.

Part-time	Mth	Yr	B	Full-time	Mth	Yr	Mandatory Days of Service!	
Sept.	113	113	E	Sept.	189	189	Make a Difference Day	Oct
Oct.	100	213	N	Oct.	191	380	Martin Luther King Day	Jan
Nov.	84	297		Nov.	158	538	Austin AmeriCorps Awareness	*April
Dec.	64	361	C	Dec.	122	660	*subject to change weekends	
Jan.	90	451	H	Jan.	171	831		
Feb.	97	548	M	Feb.	179	1,010	Events!	
Mar.	80	628	A	Mar.	151	1,161	Thanksgiving All-Staff	Nov
Apr.	95	723	R	Apr.	185	1,346	AmC Amazing Race!	Mar
May	97	820	K	May	178	1,524	AmC Recognition Ceremony	June
June	90	910	S	June	178	1,702		
	910				1,702			

SEPTEMBER 2015							OCTOBER 2015							NOVEMBER 2015							Legend	
S	M	T	W	TH	F	S	S	M	T	W	TH	F	S	S	M	T	W	TH	F	S	Enroll	
					4	5						1	2	3	1	2	3	4	5	6	7	
6	H	8	9	10	11		4	5	6	7	8	9	10	8	9	10		12	13	14		Exit
	14	15	16	17	18	19	11		13	14	15	16	17	15	16	17	18	19	20	21		Training
20		22	23	24	25	26	18	19	20	21	22	23		22	23	24	H	H	H	28		
27	28	29	30				25	26	27	28	29	30	31	29	30							
DECEMBER 2015							JANUARY 2016							FEBRUARY 2016							Holiday	
S	M	T	W	TH	F	S	S	M	T	W	TH	F	S	S	M	T	W	TH	F	S	H	
		1	2	3	4	5						H	2		1	2	3	4	5	6		
6	7	8	9	10	11	12	3		5	6	7	8	9	7	8	9	10	11	12	13		
13		15	16	17	18	19	10	11	12	13	14	15		14		16	17	18	19	20		
20	H	H	H	H	H	26	17	H	19	20	21	22	23	21	22	23	24	25	26	27		
27	H	H	H	H			24/24	25	26	27	28	29	30	28	29							
MARCH 2016							APRIL 2016							MAY 2016								
S	M	T	W	TH	F	S	S	M	T	W	TH	F	S	S	M	T	W	TH	F	S		
		1	2	3	4	5						1	2	1	2	3	4	5	6	7		
6		8	9	10	11	12	3	4	5	6	7	8	9	8		10	11	12	13	14		
13	H	H	H	H	H	19	10	11	12	13	14	15	16	15	16	17	18	19	20	21		
20	21	22	23	24	H	26	17	18	19	20	21	22		22	23	24	25	26	27	28		
27	28	29	30	31			24	25	26	27	28	29	30	29	H	31						
JUNE 2016																						
S	M	T	W	TH	F	S																
			1	2	3	4																
5	6	7	8	9		11																
12	13	14	15	16	17	18																
19	20	21	22	23	24	25																
26	27	28	29																			
							<p><b>AmeriCorps Service Calendar</b> <b>September 1, 2015 - June 30, 2016</b></p>															
							<p>Please Note: Program Enrollment 9/1 Pre-Service Orientation 9/2- 9/3 Campus visit/orientation 9/4 W/E Orientation Retreat 9/12- 9/13** CPR/First Aid Training - April **Orientation Retreat is Mandatory</p>															

# Training and Paperwork Calendars

Fall Semester	Done	Paperwork
September		
Due Oct. 4th	<input type="checkbox"/>	Site Expectations*
	<input type="checkbox"/>	Site Orientation Checklist*
	<input type="checkbox"/>	September Timesheet (□HOF if applicable*)
	<input type="checkbox"/>	Student Roster (even if 0 to report)
	<input type="checkbox"/>	Student & Teacher Pre-Surveys* (if applicable)
Due Nov. 5th	<input type="checkbox"/>	Mileage* (if applicable)
	October	
	<input type="checkbox"/>	October Timesheet (□HOF if applicable*)
	<input type="checkbox"/>	October Student Roster
	<input type="checkbox"/>	Student & Teacher Pre-Surveys* (if applicable)
Due Dec. 5th	<input type="checkbox"/>	Mileage* (if applicable)
	November	
	<input type="checkbox"/>	November Timesheet (□HOF if applicable*)
	<input type="checkbox"/>	November Student Roster
	<input type="checkbox"/>	Student & Teacher Pre-Survey*(s) (if applicable)
Due Jan. 7th	<input type="checkbox"/>	Mileage* (if applicable)
	<input type="checkbox"/>	Schedule mid-term meeting with Jennifer
	December	
	<input type="checkbox"/>	December Timesheet (□HOF if applicable*)
	<input type="checkbox"/>	December Student Roster
Due Feb. 5th	<input type="checkbox"/>	Mileage* (if applicable)
	<input type="checkbox"/>	January Timesheet (□HOF if applicable*)
	<input type="checkbox"/>	January Student Roster
	<input type="checkbox"/>	Mileage* (if applicable)
Due Feb. 7th	<input type="checkbox"/>	Mid-Term Evaluation*
	<input type="checkbox"/>	February Timesheet (□HOF if applicable*)
	<input type="checkbox"/>	February Student Roster
	<input type="checkbox"/>	Mileage* (if applicable)
Due Mar. 5th	<input type="checkbox"/>	
	<input type="checkbox"/>	
	<input type="checkbox"/>	
	<input type="checkbox"/>	
	<input type="checkbox"/>	

**AmeriCorps Service  
Calendar  
September 1, 2015 -  
June 30, 2016**

Please Note:  
Program Enrollment 9/1  
Pre-Service Orientation 9/2 - 9/3  
Campus visit/orientation 9/4  
W/E Orientation Retreat 9/12 - 9/13\*\*  
CPR/First Aid Training - April  
\*\*Orientation Retreat is Mandatory

In order to successfully complete an AmeriCorps term of service and to be eligible for the education award, members must complete a minimum of 900 hours (part-time) or 1,700 hours (full-time), attend three Mandatory Days of Service, and all resource days/trainings as mandated by the program.



- Joint Trainings
- Mentoring Programs

# Detailed Member Position Descriptions, Member Service Agreements and Site Agreements



# **Detailed Member Position Descriptions, Member Service Agreements and Site Agreements**

Member position description includes the following:

- Position Title
- Supervisor Information
- Location
- Service Position Summary
- Essential Functions
- Marginal functions
- Principal Working Relationships
- Knowledge, Skills and Abilities
- Academic, Training and Experience Qualifications
- Service Conditions
- Physical, Emotional and Intellectual Demands
- Special conditions of service

# Detailed Member Position Descriptions, Member Service Agreements and Site Agreements

	Half-time Members		Full-Time Members	
September 30, 2015	(113)	113 Hours	(189)	189 Hours
October 31, 2015	(100)	213 Hours	(191)	380 Hours
November 30, 2015	(84)	297 Hours	(158)	538 Hours
December 31, 2015	(64)	361 Hours	(122)	660 Hours
January 31, 2015	(90)	451 Hours	(171)	831 Hours
February 29, 2016	(97)	548 Hours	(179)	1,010 Hours
March 31, 2016	(80)	628 Hours	(151)	1,161 Hours
April 30, 2016	(95)	723 Hours	(185)	1,346 Hours
May 31, 2016	(97)	820 Hours	(178)	1,524 Hours
June 30, 2016	(99)	910 Hours	(178)	1,702 Hours

# Regular and Thorough Monitoring Procedures and Systems



- Relates to all five management cycles
- Impact on cost-findings
- Don't expect what you don't inspect.

# Site Management

- Site visit calendar
- Site visit interview forms
- Site visit feedback forms
- Site supervisor evaluations
- Data quality checks
- Desk audits and site audits to ensure compliance



## Site Monitoring Tool

Host Site:

Date of Visit:

Service Site(s) Visited:

FoodCorps Staff Representative(s):

Names and Titles of Meeting Attendees:

### I. PROGRAM MANAGEMENT

C	NC	NA	REQUIREMENTS	COMMENTS/NOTES/DOCUMENTS REVIEWED
			<p>1. At least one staff member of the Host Site and each Service Site has been appointed as the Host/Service Site Supervisor.</p> <p><u>Discussion Points:</u>            What is the job title of each Supervisor and what responsibilities do these staff have for the FoodCorps program at each location? How are Service Site staff trained on FoodCorps and AmeriCorps requirements and policies? How are staff members evaluated?</p>	
			<p>2. Maintain agreements with all Service Sites in the Host Site State outlining Service Site responsibilities regarding Member support, training, oversight, safety, reporting, and evaluation.</p> <p><u>Discussion Points:</u>            Are those documents on file with the Host Site?</p>	
			<p>3. Conduct a review, including a site visit, with each Service Site and report any FoodCorps related compliance or monitoring issues to FoodCorps.</p> <p><u>Discussion Points:</u></p>	



# NSCHC Review

No.	Last Name	First Name	Site	Term	Enrollment Date	N SOPW	State of Service Initiated	State of Service Completed	Application State	Out of State Initiated	Out of State Completed	FBI Check Initiated	FBI Check Completed	Initial N SCHC Email Sent	Final N SCHC Email Sent
1	Bueller	Ferris	Andrews	FT	9/2/2015	4/5/2015	4/5/2015	4/5/2015	NV	NA	NA	8/30/2015	9/8/2015	8/30/2015	9/10/2015
2	Kent	Clark	Overton	FT	9/2/2015	8/31/2015	8/31/2015	8/31/2015	CA	9/1/2015	9/24/2015	8/30/2015	9/12/2015	8/31/2015	9/12/2015
3	Parker	Peter	Simon	FT	9/2/2015	9/1/2015	9/1/2015	9/1/2015	PA	8/15/2015	8/31/2015	8/30/2015	9/8/2015	9/2/2015	9/10/2015
4	Explorer	Dora	Austin	QT	1/24/2018	12/5/2015	12/5/2015	12/5/2015	NV	NA	NA	12/5/2015	1/30/2018	12/10/2015	1/30/2018

**System to track member and grant-funded staff (cash and in-kind)**

# Member Files Management

## Member Files 2015-2016

Term	Last Name	First Name	Service Site	My AmC Invite	My AmC Enr.	App.	Ref. 1	Previous Term	NSCHC Consent	I-9	W-4	BC/P P	SS Card	DL	Enrol I Form	Health-care	Own Health care	AmC Health care	Child-Care	Service Agreement
FT	Allen	Melissa	Simon	X	X	X	X	N/A	X	X	X	X	X	X	X	X	X	N/A	X	X
PT	Ball	Laura	Travis	X	X	X	X	N/A	X	X	X	X	X	X	X	N/A	N/A	N/A	N/A	X
QT	Barron	Jennifer	Chapa	X	X	X	X	N/A	X	X	X	X	X	X	X	N/A	N/A	N/A	N/A	X
QT	Bueller	Ferris	Kealing	X	X	X	X	X	X	X	X	X	X	X	X	N/A	N/A	N/A	N/A	X
QT	Explorer	Dora	Reagan	X	X	X	X	N/A	X	X	X	X	X	X	X	N/A	N/A	N/A	N/A	X
PT	Kent	Clark	Wooten	X	X	X	X	N/A	X	X	X	X	X	X	X	N/A	N/A	N/A	N/A	X
FT	Parker	Peter	Simon	X	X	X	X	N/A	X	X	X	X	X	X	X	X	N/A	X	X	X
FT	Woman	Wonder	Kealing	X	X	X	X	NEED	X	X	X	X	X	X	X	X	N/A	X	X	X

Section I. Program Operating Costs	Budget		September		Totals					
	CNC S Share	Grantee Share	CNC S Share	Grantee Share	CNC S Share	Grantee Share	Expenses Total	CNC S Remaining	Grantee Remaining	Remaining Total
<b>A. Personnel Expenses</b>										
Senior Program Coordinator - Cash (5.0%)	50,825.00	-	4,497.87	-	8,995.34	-	8,995.34	41,829.66	-	41,829.66
Program Coordinators	84,000.00	-	6,419.83	-	12,839.66	-	12,839.66	71,160.34	-	71,160.34
Administrative Assistant	23,500.00	-	1,965.09	-	3,930.17	-	3,930.17	19,569.83	-	19,569.83
Site Supervisors - In-Kind	-	149,580.00	-	24,089.36	-	39,638.54	39,638.54	-	109,941.46	109,941.46
<b>Category Totals</b>	<b>158,325.00</b>	<b>149,580.00</b>	<b>12,882.59</b>	<b>24,089.36</b>	<b>25,765.17</b>	<b>39,638.54</b>	<b>65,403.71</b>	<b>132,559.83</b>	<b>109,941.46</b>	<b>242,501.29</b>
<b>B. Personnel Fringe Benefits</b>										
FICA - Cash	12,112.00	11,443.00	965.89	4,165.48	1,931.76	6,804.62	8,736.38	10,180.24	4,638.38	14,818.62
Worker's Compensation - Cash	1,187.00	1,122.00	33.23	-	66.47	-	66.47	1,120.53	1,122.00	2,242.53
SUI - Cash	839.00	648.00	98.49	-	196.97	-	196.97	642.03	648.00	1,290.03
Health - Cash	18,960.00	17,280.00	1,155.25	-	2,310.99	-	2,310.99	16,649.01	17,280.00	33,929.01
Retirement - Cash	3,750.00	1,800.00	144.83	-	289.66	-	289.66	3,460.34	1,800.00	5,260.34
<b>Category Totals</b>	<b>36,848.00</b>	<b>32,293.00</b>	<b>2,397.69</b>	<b>4,165.48</b>	<b>4,795.85</b>	<b>6,804.62</b>	<b>11,600.47</b>	<b>32,052.15</b>	<b>25,488.38</b>	<b>57,540.53</b>
<b>C. Travel</b>										
<b>Staff Travel</b>										
Staff Mileage	1,584.00	-	113.56	-	246.04	-	246.04	1,337.96	-	1,337.96
Travel to Commission Meetings	2,000.00	-	-	-	-	-	-	2,000.00	-	2,000.00
Travel to CNC S Meetings	2,000.00	-	-	-	-	-	-	2,000.00	-	2,000.00
Member Orientation Facility/Lodging	160.00	-	-	-	40.00	-	-	120.00	-	120.00
Member Orientation Retreat Subsistence	40.00	-	-	-	136.50	-	-	(96.50)	-	(96.50)
<b>Category Totals</b>	<b>5,784.00</b>	<b>-</b>	<b>113.56</b>	<b>-</b>	<b>422.54</b>	<b>-</b>	<b>246.04</b>	<b>5,361.46</b>	<b>-</b>	<b>5,361.46</b>
<b>Member Travel</b>										
Member mileage	1,152.00	-	121.83	-	170.69	-	170.69	981.31	-	981.31
Member bus passes - In-Kind	1,400.00	2,800.00	222.75	668.25	222.75	668.25	891.00	1,177.25	2,131.75	3,309.00
Member Retreat Lodging	2,240.00	-	2,235.83	-	2,099.13	-	-	140.87	-	140.87
Member Retreat Subsistence	560.00	-	534.83	-	534.63	-	-	25.37	-	25.37
<b>Category Totals</b>	<b>5,352.00</b>	<b>2,800.00</b>	<b>3,114.84</b>	<b>668.25</b>	<b>3,027.20</b>	<b>668.25</b>	<b>1,061.69</b>	<b>2,324.80</b>	<b>2,131.75</b>	<b>4,456.55</b>
<b>E. Supplies</b>										
Campus supplies	3,040.00	-	-	-	-	-	-	3,040.00	-	3,040.00
Program supplies	1,680.00	-	582.50	-	1,195.67	-	1,195.67	484.33	-	484.33
Member service gear	2,016.00	-	580.00	-	1,964.60	-	1,964.60	51.40	-	51.40
Supplies for CPR/First Aid training	250.00	-	-	-	-	-	-	250.00	-	250.00
Member Nametags	720.00	-	457.50	-	472.50	-	472.50	247.50	-	247.50
<b>Category Totals</b>	<b>7,706.00</b>	<b>-</b>	<b>1,620.00</b>	<b>-</b>	<b>3,632.77</b>	<b>-</b>	<b>3,632.77</b>	<b>4,073.23</b>	<b>-</b>	<b>4,073.23</b>
<b>G. Member and Staff Training</b>										
American Red Cross CPR/First Aid training	1,512.00	-	-	-	-	-	-	1,512.00	-	1,512.00

# Poll

What communication methods and/or tools do you utilize to communicate with your staff, sites, members and State Commission?



# Frequent Communication with staff, sites, members and State Commission

- Ensure everyone is on the same page
- Identify issues early
- Recognition











# Thank you!

Jennifer Cowart

[jeftsconsulting@gmail.com](mailto:jeftsconsulting@gmail.com)

956-827-5298