

AmeriCorps Program Director Manual

# **Policies & Procedures**

A Resource for Program Directors

2023-2024 Program Year



*The Governor's Commission  
on Service and Volunteerism*



**AmeriCorps**  
Idaho

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**Attachments**

- Forms and documents related to the policies and procedures in this manual can be found on Basecamp for Program Directors.

**Other Helpful Links**

- [eGrants User Guide](#)
- [eGrants AmeriCorps Member Management PowerPoint](#)

# Introduction

## 1. Purpose of This Manual

The **Idaho AmeriCorps Program Director Policy and Procedure Manual** has been specifically designed as a guide for those who administer AmeriCorps programs in Idaho. This manual assists in detailing the process for monitoring, supporting, and evaluating programs and, for working collaboratively to make the AmeriCorps programs in Idaho successful.

Please note that the information contained in this manual does not include all the legal requirements of an AmeriCorps grant. Program directors or individuals with particular questions should consult the [National and Community Service Act of 1990](#) (42 U.S.C. 12501 et seq.), the regulations issued under the Act ([45 CFR Sections 2520 – 2550](#)), the AmeriCorps General [Grant Terms & Conditions, Terms and Conditions for AmeriCorps State and National, Grants Policy Guidance, FY 2023 General Terms and Conditions](#) and relevant state law and regulations. If there is a conflict between the content of this handbook and 45 CFR §2520, the CFR is the controlling authority.

### **The Idaho AmeriCorps Program Director Policy and Procedure Manual:**

- Provides a roadmap for AmeriCorps grantee/site management,
- Illustrates legal requirements, and
- Shows where there is both control and flexibility to shape each AmeriCorps program.

It is important that sub-grantees become familiar with all the information contained in this manual. **The Idaho AmeriCorps Program Director Policy and Procedure Manual** will be revised annually. An updated manual will be sent electronically to each Idaho AmeriCorps Program Director, posted on the Program Directors Basecamp page [and on the Serve Idaho website](#).

## 2. Statutes and Regulations

### **Statutes**

Domestic and Volunteer Service Act of 1975

National and Community Service Act of 1990, as amended

- (42 U.S.C. 12501, et seq.) – Chapter 129 (approx. 95 pages)

National and Community Service Trust Act of 1993

Serve America Act of 2009

### **Regulations**

- [45 CFR § 1200-1299 \(Chapter XII\)](#)
- [45 CFR §2500-2599 \(Chapter XXV\)](#)

For a full list of AmeriCorps Statutes and Regulations please visit:

[Statutes and regulations | AmeriCorps](#)

## **1. Serve Idaho Mission**

### **"TO INSPIRE AND RECOGNIZE VOLUNTEERS AND EMPOWER COMMUNITIES THROUGH SERVICE AND AMERICORPS TO ADDRESS IDAHO'S UNMET NEEDS."**

To achieve this mission, Serve Idaho promotes collaborative efforts among private and nonprofit organizations, schools and state and local government agencies to advance national service programs and volunteerism throughout the state. More information can be found at [serve.idaho.gov](https://serve.idaho.gov).

#### **Serve Idaho meets its mission through:**

- Administration of Idaho's AmeriCorps grants to address critical community needs through a year of dedicated service.
- Leadership of Idaho's promise to ensure that young people have the resources they need to be successful.
- Hosting the annual Serve Idaho Conference on Service and Volunteerism to provide volunteer management and professional development training for AmeriCorps members.
- In partnership with the Idaho Nonprofit Center, provide volunteer management training during the Idaho Nonprofit Center Annual Conference and Regional Trainings.
- In partnership with the Idaho Nonprofit Center, host the Idaho Philanthropy Day to recognize Idaho's outstanding volunteers and philanthropists.
- Leadership in national days of service including Martin Luther King Jr. Day, AmeriCorps Week and September 11th Day of Service and Remembrance.

## **2. Serve Idaho History**

Serve Idaho, The Governor's Commission on Service and Volunteerism was established through Executive Order by Governor Cecil D. Andrus in 1994 as a result of the National and Community Service Trust Act of 1993 and the creation of AmeriCorps.

Serve Idaho has been housed with the Idaho State Board of Education and the Idaho Department of Correction. The commission joined the Idaho Department of Labor in July 2009. The Department of Labor serves as the host agency for the administration of the Serve Idaho Commission.

Serve Idaho is funded by grants from AmeriCorps and through cash and in-kind donations from state and local partners. The Department of Labor provides matching funds and other administrative support to the commission. Serve Idaho does not receive general funds from the state.

# AmeriCorps Program Requirements

## [45 CFR Section 2522.100](#)

### **Minimum Requirements that Every AmeriCorps Program, Regardless of Type, Must Meet**

Although a wide range of programs may be eligible to apply for and receive support from AmeriCorps, all AmeriCorps subtitle C programs must meet certain minimum program requirements. These requirements apply regardless of whether a program is supported directly by AmeriCorps or through a sub-grant issued by Serve Idaho. All AmeriCorps programs must:

- (a) Address educational, public safety, human, or environmental needs, and provide a direct and demonstrable benefit that is valued by the community in which the service is performed;
- (b) Perform projects that are designed, implemented, and evaluated with extensive and broad-based local input, including consultation with representatives from the community served, participants (or potential participants) in the program, community-based agencies with a demonstrated record of experience in providing services, and local labor organizations representing employees of project sponsors (if such entities exist in the area to be served by the program);
- (c) Obtain, in the case of a program that also proposes to serve as the project sponsor, the written concurrence of any local labor organization representing employees of the project sponsor who are engaged in the same or substantially similar work as that proposed to be carried out by the AmeriCorps participant;
- (d) Establish and provide outcome objectives, including a strategy for achieving these objectives, upon which self-assessment and AmeriCorps-assessment of progress can rest. Such assessment will be used to help determine the extent to which the program has had a positive impact:
  - (1) On communities and persons served by the projects performed by the program;
  - (2) On participants who take part in the projects; and
  - (3) In such other areas as the program or AmeriCorps may specify;
- (e) Strengthen communities and encourage mutual respect and cooperation among citizens of different races, ethnicities, socioeconomic backgrounds, educational levels, both men and women and individuals with disabilities;
- (f) Agree to seek actively to include participants and staff from the communities in which projects are conducted, and agree to seek program staff and participants of different races and ethnicities, socioeconomic backgrounds, educational levels, and genders as well as individuals with disabilities unless a program design requires emphasizing the recruitment of staff and participants who share a specific characteristic or background. In no case may a program violate the nondiscrimination, non-duplication and non-displacement rules governing participant selection described in part [2540](#) of this chapter. In addition, programs are encouraged to establish, if consistent with the purposes of the program, an intergenerational component that combines students, out-of-school youths, and older adults as participants;

(g)

(1) Determine the projects in which participants will serve and establish minimum qualifications that individuals must meet to be eligible to participate in the program; these qualifications may vary based on the specific tasks to be performed by participants. Regardless of the educational level or background of participants sought, programs are encouraged to select individuals who possess leadership potential and a commitment to the goals of the AmeriCorps program. In any case, programs must select participants in a non-partisan, non-political, non-discriminatory manner, ensuring fair access to participation. In addition, programs are required to ensure that they do not displace any existing paid employees as provided in part [2540](#) of this chapter;

(2) In addition, all programs are required to comply with any pre-service orientation or training period requirements established by AmeriCorps to assist in the selection of motivated participants. Finally, all programs must agree to select a percentage (to be determined by AmeriCorps) of the participants for the program from among prospective participants recruited by AmeriCorps State Commissions under part [2533](#) of this chapter. AmeriCorps may also specify a minimum percentage of participants to be selected from the national leadership pool established under [§2522.210\(c\)](#). AmeriCorps may vary either percentage for different types of AmeriCorps programs;

(h) Provide reasonable accommodation, including auxiliary aids and services (as defined in section 3(1) of the Americans with Disabilities Act of 1990 (42 U.S.C. 12102(1)) based on the individualized need of a participant who is a qualified individual with a disability (as defined in section 101(8) of such Act (42 U.S.C. 12111(8))). For the purpose of complying with this provision, AmeriCorps programs may apply for additional financial assistance from AmeriCorps pursuant to [§2524.40](#) of this chapter;

(i) Use service experiences to help participants achieve the skills and education needed for productive, active citizenship, including the provision, if appropriate, of structured opportunities for participants to reflect on their service experiences. In addition, all programs must encourage every participant who is eligible to register to vote prior to completing a term of service;

(j) Provide participants in the program with the training, skills, and knowledge necessary to perform the tasks required in their respective projects, including, if appropriate, specific training in a particular field and background information on the community, including why the service projects are needed;

(k) Provide support services;

(1) To participants who are completing a term of service and making the transition to other educational and career opportunities; and

(2) To those participants who are school dropouts in order to assist them in earning the equivalent of a high school diploma;

(l) Ensure that participants serving in approved AmeriCorps positions receive the living allowance and other benefits described in [§2522.240](#) through [2522.250](#) of this chapter.

(m) Describe the way the AmeriCorps educational awards will be apportioned among individuals serving in the program. If a program proposes to provide such benefits to less than 100 percent of the participants

in the program, the program must provide a compelling rationale for determining which participants will receive the benefits and which participants will not. AmeriCorps programs are strongly encouraged to offer alternative post-service benefits to participants who will not receive AmeriCorps educational awards, however AmeriCorps grant funds may not be used to provide such benefits;

(n) Agree to identify the program, through the use of logos, common application materials, and other means (to be specified by the AmeriCorps), as part of a larger national effort and to participate in other activities such as common opening ceremonies (including the administration of a national oath or affirmation), service days, and conferences designed to promote a national identity for all AmeriCorps programs and participants, including those participants not receiving AmeriCorps educational awards. This provision does not preclude an AmeriCorps program from continuing to use its own name as the primary identification, or from using its name, logo, or other identifying materials on uniforms or other items;

(o) Agree to begin terms of service at such times as AmeriCorps may reasonably require and to comply with any restrictions AmeriCorps may establish as to when the program may take to fill an approved AmeriCorps position left vacant due to attrition;

(p) Comply with all evaluation procedures specified by AmeriCorps, as explained in [§2522.500](#) through [2522.560](#);

(q) In the case of a program receiving funding directly from AmeriCorps, meet and consult with the State Commission for the State in which the program operates, if possible, and submit a copy of the program application to the State Commission; and

(r) Address any other requirements as specified by AmeriCorps.

Per the current AmeriCorps State and National Grant Terms and Conditions, the website of all subgrantee organizations must clearly state that they are an AmeriCorps program and display the AmeriCorps logo with prominence and link to [Home | AmeriCorps](#). Additionally, all locations where members serve must post a list of prohibited activities and signage that a member is serving at the location. Prohibited activities posters can be obtained by contacting Serve Idaho or downloading from [Basecamp](#).

## Marketing and Outreach

Every year, thousands of stories about AmeriCorps Seniors, and AmeriCorps appear in the media – almost all generated by local project staff and volunteers. Publicizing your program is a means of building support for your program and increasing your likelihood of success. Taking the time to communicate with the public helps attract resources from your community, including volunteers, sponsors, and funding, and helps educate people about your program. AmeriCorps provides communications and marketing resources at <https://americorps.gov/newsroom/communication-resources>.

## Presentations and Published Material

Per the [AmeriCorps general terms and conditions](#), when marketing your AmeriCorps program, it must be acknowledged that it is funded in part by Serve Idaho and AmeriCorps. All agreements with subrecipients, operating sites, or service locations, related to the AmeriCorps program must explicitly state that the program is an AmeriCorps program. Similarly, recipients and subrecipients shall identify all



national service members serving in their programs as AmeriCorps members.

## **Publications Required Verbiage**

Publications created by members or grant-funded staff are consistent with the purposes of the grant. The AmeriCorps logo is included on such documents. The program assures that the following acknowledgment and disclaimer appears in any external report or publication of material based upon work supported by this grant. “This material is based upon work supported by AmeriCorps under AmeriCorps Grant No. Opinions or points of view expressed in this document are those of the authors and do not necessarily reflect the official position of, or a position that is endorsed by, AmeriCorps.”

## **AmeriCorps Signage**

All sites hosting an AmeriCorps member must have signage showing that a member is serving in the location and displaying all prohibited member activities. Signage is provided by Serve Idaho, but it is the responsibility of the program to ensure each site has the signage prominently displayed.

## **AmeriCorps Logo**

The AmeriCorps logo shall be included on publications related to an award of AmeriCorps assistance or resources including the programs website. The AmeriCorps Idaho logo can be found on Basecamp in General Grants Management Folder under Docs & Files.

Programs may not alter the AmeriCorps logos or other AmeriCorps branding and must obtain written permission from AmeriCorps before using the AmeriCorps name or logo on materials that will be sold. Programs must also obtain written permission from AmeriCorps before permitting donors to use the AmeriCorps name or logo in promotional materials.

Program may not use or display the AmeriCorps logo or name in connection with any activity prohibited by statute or regulation.

AmeriCorps programs must follow brand guidelines when utilizing the AmeriCorps logo. The [brand guidelines](#) provide the color palette, tints, shades, co-branding requirements and messaging requirements.

## **Photographs:**

Each subgrantee is requested to take several high-quality digital pictures of AmeriCorps members “in action” wearing their AmeriCorps gear. These photos should reflect the diversity of service in Idaho as well as of our members. Programs are expected to send any quality photos along with stories or captions that describe the activity to Serve Idaho to share and highlight member achievements on a regular basis through social media and with AmeriCorps, or in publications. Some of the opportunities for programs to share their photos with Serve Idaho can be with progress reports, or when members or programs are featured in local news.

### **1. Member Informed Consent**

During the enrollment of members, programs need to obtain member informed consents to ensure they are aware of this expectation. Members will agree to the use of their photo and/or voice recording by signing their member service agreement, or in some cases, programs may elect to have members sign a separate consent form.

## 2. Client Informed Consent

Some of the best action photos of members are those in which members are performing service with their clients or students. Programs are advised to receive consent from individuals who appear in photos or videos. Programs should keep the completed forms on file when taking and sending photos to Serve Idaho.

## **Important Program Dates**

### 1. Federal Financial Report (FFR) Due Dates 2023-2024

#### ***First Report: April 19, 2024***

For expenses incurred from the Start of Program 2023 – March 31, 2024.

#### ***Final Report: October 18, 2024***

For expenses incurred from Start of Program 2023- End of Program (July or August 2024 depending on program end date).

### 2. Program Progress Reports (PPR) Due Dates 2023-2024

Please provide *cumulative* data from the start of the program year to the end date indicated for each reporting period below. If your program's subrecipient agreement has different due dates listed, the subrecipient agreement takes precedence. All PPR data will be submitted in America Learns and reminders will be emailed via America Learns.

#### **Due October 11, 2023: Final PPR for 2022-2023 Grant Year (All Programs)**

For the Beginning of Program 2022-End of Program 2023

#### **Due January 10, 2024 (High Risk and New Programs)**

For the Beginning of Program 2023-December 31, 2023

#### **Due April 10, 2024 (All Programs)**

For the Beginning of Program 2023 through March 31, 2024 (all programs)

#### **Due July 10, 2024 (High Risk and New Programs)**

For the Beginning of Program 2023-June 30, 2024

#### **Due October 10, 2024 (All Programs)**

For the Beginning of Program 2023-End of Program 2024

The completed PPR includes information on: progress toward performance measures, member and volunteer hours, program challenges, program successes, etc.

### **Reporting Expectations and Requirements**

The subgrantee is required to comply with all reporting requirements as outlined above as well as any modifications to the reporting requirements and/or deadlines requested by Serve Idaho. In the event the subgrantee is not able to meet the stated deadline in a timely manner for reasons legitimately beyond the control of the subgrantee, an extension will be considered only if Serve Idaho receives a **written request** explaining the need for an extension **PRIOR** to the deadline. A subgrantee should not assume approval has been authorized by Serve Idaho until it receives written confirmation.

Note: The report due dates stated in the current AmeriCorps State and National Grant Provisions are set by AmeriCorps and apply to State Commissions not its subgrantees.

### **3. Mandatory Program Director Meetings and Calls**

#### In-Person Program Director Meetings:

Wednesday, October 11, 2023  
Wednesday, January 17, 2024  
Thursday, May 2, 2024  
Thursday, July 25, 2024

#### Virtual Program Director Calls:

Tuesday, September 5, 2023	Tuesday, March 5, 2024
Tuesday, October 3, 2023	Tuesday, April 2, 2024
Tuesday, November 7, 2023	Tuesday, May 7, 2024
Tuesday, December 5, 2023	Tuesday, June 4, 2024
*Tuesday, January 9, 2024	*Tuesday, July 9, 2024
Tuesday, February 6, 2024	Tuesday, August 6, 2024
*rescheduled due to a holiday	

The Program Director Meetings are mandatory and will be held in-person in Boise or at a program’s location. If the Program Director cannot attend, they should send a representative in their place. If the Program Director or a staff member from the AmeriCorps program is unable to attend, please contact the Serve Idaho Grants Officer. Failure to attend the Program Director Meetings or send a representative may impact a program’s overall risk assessment standing.

Program Directors failing to provide 24-hour notice of their inability to attend a Program Director’s Meeting will be charged for costs associated with the meeting. This includes the cost of food.

Program Director Calls will be held every first Tuesday of the month. The calls will be held over Zoom and are mandatory for Program Directors or a representative to attend.

#### Quarterly Program Check-Ins:

The Serve Idaho Grants Officer will set up quarterly check-in meetings with each program at the beginning of each program year. These meetings are 1:1 calls where the program is able to discuss any issues or address any outstanding questions with Serve Idaho staff members. Of course, programs do not need to wait until a Quarterly Check-In to ask Serve Idaho staff questions or seek clarification.

### **4. Changes to Program Director**

Any change to the AmeriCorps Program Director should be reported to Serve Idaho as soon as possible. If a Program Director leaves the program unexpectedly, the organization should notify Serve Idaho and appoint a replacement to oversee the program.

As soon as a new Program Director is identified, Serve Idaho should be notified and will work with the new Program Director to provide training within the first 30 days of their new position.

## 5. Site Visit Dates

The need for in-person site visits will be determined by programmatic and fiscal risk assessments that are completed in winter 2023. Serve Idaho will notify each program about their site visit plan after these risk assessments are complete.

## 6. Member Training Dates

Most Member Trainings will occur virtually. All half-time, three quarters-time and full-time members are required to attend a Strengths Training Session. Members can register for a session on [Eventbrite](#).

*2023-2024 program year Strength Training Sessions:*

Friday, Nov. 11 from 1pm-3pm	Tuesday, May 21 from 11am-1pm
Saturday, Dec. 9 from 10am-12pm	Saturday, Jun. 8 from 10am-12pm
Tuesday, Dec. 19 from 12pm-2pm	Thursday, Jun. 20 from 2pm-4pm
Thursday, Jan. 11 from 2pm-4pm	Friday, July 12 from 12pm-2pm
Saturday, Jan. 27 from 10am-12pm	

Any other training offered by Serve Idaho are TBD.

## 7. Serve Idaho AmeriCorps Conference Dates

The Serve Idaho AmeriCorps Conference will be held in-person on March 11-12, 2024 in Boise, Idaho at the Riverside Hotel.

The Serve Idaho AmeriCorps Conference is mandatory for full-time, three-quarter-time and half-time AmeriCorps members serving at the time of the conference and for at least one AmeriCorps program staff. If a member is unable to attend, the program will need to provide an avenue for them to receive the pertinent training.

## 8. National Days of Service

Idaho AmeriCorps State programs are required to participate in three national days of service. They are to include Martin Luther King Jr. Day, Idaho@Play and one day of service of their choice. Those programs who do not operate in January can select two days of service of their choice.

**National Service members or program staff members planning events for National Days of Service should complete [this Overview Reporting Form](#) before the event. After the event, National Service members should fill out [this Event Recap Form](#). For a list of national days of service please see below:**

### **AmeriCorps Recognized National Days of Service:**

#### **September 11<sup>th</sup> National Day of Service and Remembrance**

*September 11, 2023—I Remember. I Serve.*

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Thanks to the support of many others in the 9/11 community, 9/11 Day has transformed September 11 into the largest day of service in America, officially recognized under federal law. More than 30 million Americans and others participate, dedicating time each 9/11 to helping others in need, and rekindling the spirit of unity that brought Americans together in the days following the 9/11 tragedy.

<http://www.911day.org/> ; <https://americorps.gov/serve/volunteer/911-day>

#### **Martin Luther King, Jr. Day**

*January 15, 2024—Make it a day ON...Not a day OFF!*

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The Martin Luther King, Jr., National Day of Service is a defining moment each year when Americans across the country step up to make communities more equitable and take action to create the Beloved Community of Dr. King’s dream. While Dr. King believed the Beloved Community was possible, he acknowledged and fought for systemic change. His example is our call to action. For more information visit <https://americorps.gov/serve/volunteer/mlk-day>

### **AmeriCorps Week**

*March 2024 (Exact Week TBD by AmeriCorps) – Celebrate AmeriCorps!*

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AmeriCorps Week is a recruitment and recognition event designed to bring more Americans into service, salute AmeriCorps members and alums for their powerful impact, and thank the community partners who make AmeriCorps possible. AmeriCorps Week provides an opportunity for AmeriCorps members, alums, grantees, program partners, and friends to shine a spotlight on the work done by members in communities across the country -- and to motivate more individuals to join AmeriCorps or volunteer in their communities. Visit <https://americorps.gov/newsroom/events/americorps-week> for more information.

### **Idaho@Play:**

*First week of June 2024 – Lets play outside!*

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With the help of AmeriCorps members, Idaho@Play is a call for all kids and adults alike to get moving and play outside.

## **Other Recognized National Days of Service**

### **Make a Difference Day**

*October 28, 2023—National Day to Help Others!*

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Make a Difference Day is to inspire and reward volunteers. Everyone who helps others on this day and submits an entry form is eligible for a national or local award and for a cash donation to a charitable cause. Every award recipient will appear in USA WEEKEND Magazine and on [makeadifferenceday.com](http://makeadifferenceday.com). Sponsors are USA WEEKEND Magazine and the Points of Light Hands On Network.

### **Family Volunteer Day**

*November 18, 2023— Be an Incredible Family—Volunteer!*

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Family Volunteer Day is to call families across America to work together in volunteer service to strengthen their families, communities, local businesses, and non-profit organizations. A program of Points of Light Hands On Network, sponsored by Walt Disney Company.

For more information visit: <https://www.pointsoflight.org/events/>

### **National Volunteer Week**

*April 21-27, 2024 )– Inspire By Example!*

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National Volunteer Week is to recognize and celebrate the efforts of volunteers at the local, state and national levels. The sponsor is the Points of Light Hands On Network.

**For more information, contact: 1-800-VOLUNTEER or visit:**

<https://www.pointsoflight.org/nvw/>

## **Global Youth Service Day (GYSD)**

*April 19-21, 2024— The power of youth serving youth!*

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Global Youth Service Day is to empower young people, highlighting their ongoing contributions to their communities and mobilizing their energy, commitment, and idealism through sustainable service. Sponsors are Youth Service America, National Youth Leadership Council, Parade Magazine, and 49 national partner organizations including the Points of Light Hands On Network and 13 sponsors including AT&T. For more information visit [www.YSA.org/GYSD](http://www.YSA.org/GYSD).

## **Join Hands Day**

*May 4, 2024 —Youth and Adults Volunteering Together!*

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Join Hands Day is a day that brings youth and adults together to improve their own communities. Sponsors are America’s Fraternal Benefit Societies.

# **Member Management**

## **1. Recruitment**

### **Local recruitment**

As an AmeriCorps program, you must actively seek to recruit program members, making it a priority to recruit from the community in which the project is conducted. Members of diverse races and ethnicities, socioeconomic backgrounds, education levels, both men and women, and individuals with disabilities, unless and to the extent that the approved program design requires emphasizing the recruitment of staff and members who share a specific characteristic or background. However, **in no case may you violate the nondiscrimination and non-displacement rules governing participant selection.**

### **Idaho AmeriCorps Members Serving in Another State**

Serve Idaho receives funding from AmeriCorps to provide programming that benefits the people of Idaho. The executive order states in part “Serve Idaho (the Commission) is hereby established to advise and assist in the development and implementation of a comprehensive, statewide plan for promoting volunteer involvement and citizen participation in Idaho...”

Therefore, it is the policy of Serve Idaho that all grant funds be expended within the borders of Idaho except in the following circumstances:

- 1) An adjoining state asks for support of a service project that is for a limited period of time not to exceed two (2) days and is approved by the Serve Idaho Program Manager.
- 2) A grant is written by an Idaho program that includes work in another state that can be demonstrated to benefit the people of Idaho through measurable outcomes and is approved by the Commission.

If a program would like to request a waiver to this policy, they may contact Serve Idaho to begin the process of requesting a waiver to be approved by the Commission.

### **Nepotism Policy**

In order to avoid the presence or perception of nepotism within AmeriCorps Idaho, it is Serve Idaho’s policy that if a close relative of any program staff member would like to participate in AmeriCorps at that program, the close relative of the member should not be involved in the interviewing, selection, onboarding or supervising the member in any way. In addition, programs should not place members at a site where their direct or indirect supervisor would be a close relative.

For this purpose, the term “close relative” includes parent, child, grandchild, grandparent, sibling, spouse, cousin, niece, nephew, aunt, or uncle.

### **My AmeriCorps - Your Online AmeriCorps Recruitment System**

To assist you in reaching a national pool of potential members, you must list your program opportunities online. You will access the recruitment system through eGrants. If you are new to AmeriCorps, you will need to register to get an eGrants account. You will then need to contact the person in your agency who created the AmeriCorps eGrants account (Grant Administrator) to be given the capability to use the recruitment features. Once Serve Idaho receives the Notice of Grant Award (NOGA) for your program and notifies you, you may begin posting opportunities, searching for applicants based on your needs, contacting applicants, reviewing applications and selecting your volunteers.

A step-by-step guide to create a member listing can be found on [Basecamp](#).

### **Member Position Descriptions**

Position descriptions shall be developed for each member position and should be specific to the needs of the site and the community where the member is serving. The [Member Position Description Outline](#) can be used to write each description. They should be reviewed and updated annually by the program. An example of a [position description can be found on Basecamp](#). Additionally, reviewing other program position descriptions at [MyAmeriCorps.gov](#) can be helpful in developing your position description.

All member positions must be input into eGrants and are reviewed by AmeriCorps staff prior to being posted. Details on how to input Member Position Descriptions into the system can be found in [Basecamp](#).

### **Team Leader is a role/title that is recognized by AmeriCorps**

The National and Community Service Act, as amended, provides for approved national service positions to include a “position involving service as a crew leader in a youth corps program or a similar position supporting a national service program that receives an approved national service position” 42 U.S.C § 12573(6). This language allows programs, in addition to youth corps, to use AmeriCorps members to provide an additional layer of leadership and support for members under certain conditions. The following is guidance on the use of AmeriCorps members as Team Leaders. Because of the need to ensure that Team Leader functions and staff functions remain clearly distinct, AmeriCorps program officers may request a description of Team Leaders’ roles and responsibilities.

*Team Leaders are not permitted to act in a staff capacity.* Supervising members is a staff responsibility. Team Leaders must not be responsible for program development and coordination; however, they may assist by providing information and resources on best practices or by helping to develop portions of the program such as the training curriculum. Under no circumstances should an AmeriCorps member serving as a Team Leader be the individual legally responsible for the program or other members. The Team Leader position description should predominantly include activities that involve them in performing direct service or providing support to members engaged in direct service.

### **Examples of allowable Team Leader activities:**

- Working alongside members performing direct service, to serve as a model and to provide on the spot assistance,

- Training members; providing guidance to members; providing support to members, including reflection exercises, conflict resolution, advice for transitioning out of AmeriCorps, etc.
- Arranging member development activities,
- Building a sense of esprit de corps and general team cohesion among members,
- Leading and facilitating team service projects,
- Working with the community to develop partnerships, including community volunteers,
- Communicating with program staff, site supervisors, and other members to ensure the execution of a quality program that is consistent with the AmeriCorps statutes, regulations and terms and conditions.

While Team Leaders are not to serve as the program’s administrative staff, they may be engaged, on a limited basis, in activities that support the administration of the AmeriCorps program. These include:

- Raising funds or in-kind contributions in direct support of specific AmeriCorps projects, such as team service projects. See [45 CFR §2520.40](#) and [45 CFR §2520.45](#) for greater detail regarding members and fundraising.
- Participating in recruitment activities for new members.

**Examples of unallowable Team Leader activities:**

- Signing member timesheets,
- Evaluating member performance,
- Disciplining AmeriCorps members,
- Enrolling/dismissing AmeriCorps members,
- Writing and/or signing program reports,
- Managing the program’s payroll and budget.

**2. Enrollment and Retention Rates**

AmeriCorps has the following expectations:

ENROLLMENT RATE = Total slots filled divided by the total slots awarded.

**Enrollment for programs should be 100%.**

RETENTION RATE = Total members exiting with an Education Award divided by the total slots filled.

**Program retention rate should be 85% or higher.**

AmeriCorps realizes that many programs not yet meeting these rates are nevertheless performing well in their individual circumstances. Also, retention may vary among effective programs depending on the target populations for those programs. However, in order to leverage limited program dollars, AmeriCorps expects programs to strive toward improving their rates of enrollment and retention. Programs not meeting standards will be required to provide rationale during the application process.

**Recruitment/Retention Rate Reports**

To view enrollment and retention using the data in eGrants:

1. Log into your account via [eGrants](#)
2. Click on “Portal Home”
3. Select S&N Reports
4. Select the report you wish to view from the drop-down menu (Enrollment Rate Report or



- Retention Rate Report)
5. Select Program year
  6. Select format (PDF, Excel etc.)
  7. Select Submit
  8. You may open or save the report created

### **3. ADA Accommodations**

In compliance with the Americans with Disabilities Act (ADA) (42 U.S.C. 12101, et seq.), programs must provide reasonable accommodations to the known mental or physical disabilities of members, and all selections and project assignments must be made without regard to the need to provide reasonable accommodations. As a Program Director, you may be called upon to make decisions regarding reasonable accommodation. However, the law does not require that you provide reasonable accommodations for any participant who would pose a direct threat to the health and safety of others even if accommodated.

#### **Reasonable Accommodation Request Policy and Procedure**

Programs should submit any requests for reasonable accommodation to Serve Idaho. The Disability Accommodation Reimbursement Grant Form can be found on [Basecamp](#) Serve Idaho will submit requests to AmeriCorps who will approve based on available funding. If funding has been exhausted then costs will not be reimbursed, and it will be the responsibility of the program to cover any costs.

If AmeriCorps approves costs, then they will provide the reimbursement to Serve Idaho and Serve Idaho will provide the reimbursement to the program. Grantees are eligible to submit requests for costs of products and services connected to disability accommodations or for the reimbursement of the costs of reasonable accommodations that were provided within the last 90 days and for which they have the required documentation.

It is important to understand that by applying for reasonable accommodation reimbursement grants, you are requesting to be reimbursed for expenses incurred. AmeriCorps and Serve Idaho does not make advanced payments to cover reasonable accommodation expenses.

AmeriCorps *encourages* programs to determine what each of their service members' accommodation needs are for the service term so they can submit requests for reimbursement. Requests for reimbursement of a single expense can be submitted at any time. However, reasonable accommodation grant funds are available on a noncompetitive basis and requests are processed in the order they are received.

If a program intends to request reimbursement for multiple expenses throughout the year, the program's initial request must estimate what the total reimbursable expenses will be. The request will be assigned an identification number, which the program must use to submit subsequent requests for reimbursement on a quarterly basis.

Grantees must retain and be prepared to provide documentation for each member for whom reasonable accommodation grant funds are requested. The documentation must show that:

- The goods or services needed to provide the reasonable accommodation were procured in conformance with the procurement standard specified in [2 C.F.R. §200.317 – 200.326](#) and
- Verification by the member that the accommodation was provided.

AmeriCorps will assign an identification number to each request for reasonable accommodation

grant funds. This means that once a program has submitted a request, AmeriCorps will send notification of the identification number that accompanies the transaction and it will be ***the program's responsibility*** to share this internally with those who track grant funds. It is important that the program include this tracking number when they are emailing receipts for reasonable accommodation service contracts that extend throughout the fiscal year.

#### **Process for submitting applications:**

Please send an email to [kimberly.empey@labor.idaho.gov](mailto:kimberly.empey@labor.idaho.gov) that contains a completed Serve Idaho Disability Accommodation Reimbursement Request form which you can find on [Basecamp](#).

- Keep the name of the organization listed on the form consistent with the name of your organization in eGrants.

The process of selecting the accommodation should be an interactive collaboration between the AmeriCorps member, his or her supervisor, and program managers. Free technical assistance regarding disability accommodation is available through the Job Accommodation Network: [www.askjan.org](http://www.askjan.org)

The program will receive a response to their request for disability accommodation funds within a few weeks of submitting it. Do not include personally identifying information in the request. Submission of application for reasonable accommodation funds serves as a certification by the Grantee that the AmeriCorps member for whom the accommodation funds are sought has a disability as defined in the Americans with Disabilities Act (ADA). "A person has a disability if they have a mental or physical impairment that substantially limits one or more major life activities."

The program is not required to obtain documentation that the service member has a disability if the disability is apparent.

The program should obtain documentation from a medical or rehabilitation expert to better understand the need for the reasonable accommodation for service member requests where a disability is non-apparent, or the accommodation request is not straightforward. These professionals can also verify that someone meets disability status.

#### **Disability Benefits Question:**

If a potential AmeriCorps member or current AmeriCorps member has questions about how AmeriCorps benefits will affect Disability benefits have them contact [DisAbility Rights Idaho](#) at 1-800-632-5125.

## **4. Verifying Identity and Citizenship of Members**

By law, to serve in an approved AmeriCorps position, an individual must be a citizen, national, or lawful permanent alien of the United States ([45 CFR §2522.200 \(a\)\(3\)](#)).

If an individual's information cannot be automatically verified by the Social Security Administration, through the e-Grants/My AmeriCorps Portal, AmeriCorps State and National grantees will receive an email notifying them that the individual's social security number (SSN) and citizenship could not be verified, and that the grantee needs to obtain and submit to AmeriCorps via a secure file transfer the required documentation. Programs must keep a physical file with copies of eligibility documents including SSN information and citizenship documentation. Approved citizenship documentation includes the documents outlined in [45 CFR §2522.200 c-e](#). Serve Idaho recommends that you monitor

members' verification status in e-Grants.

Member verification status will show as Pending, Pending Manual Verification, Verified, Manually Verified, Manually Returned, Returned, Cannot be Verified or Previously Served. Definitions of each of these terms are found at:

[https://my.americorps.gov/trust/help/applicant/Citizenship\\_Validation\\_Status.htm](https://my.americorps.gov/trust/help/applicant/Citizenship_Validation_Status.htm)

Unless the status is Verified, Manually Verified or Previously Served, a program cannot move forward with the enrollment process. If the status is Manually Returned, or Returned, additional documentation will need to be sent to AmeriCorps via secure file transfer. An explanation of how to request a secure file transfer is included in [Basecamp](#).

If the individual or grantee wishes to update the individual's name, date of birth, or social security number in the My AmeriCorps system, they will still need to send in documentation via secure file transfer so that the updates can be made. Individuals may have difficulty using their Segal AmeriCorps Education Award if this information in the system is incorrect.

For additional information regarding identity or citizenship verification, please visit the member enrollment resources.

If after reviewing the FAQs you have additional questions, please contact the National Service Hotline at 1-800-942-2677 or fill out a webform at <https://americorps.gov/contact>.

## 5. Criminal History Checks

Under the Serve America Act (SAA) all sub-grantees **must** conduct National Service Criminal History Checks (NSCHC) as described below, for all AmeriCorps members serving in a program as well as individuals in positions in which they will receive a salary, directly or reflected as match, under a cost reimbursement grant. Failure to comply with this directive will result in the disallowance of financial compensation.

In addition to completing the NSCHC background checks on time and retaining supporting documentation, program staff who work with background checks must take the [NSCHC eCourse in Litmos](#) annually. Once the e-course has been completed, keep a copy for your internal records and send a copy to Serve Idaho's Grants Officer electronically. **Completed staff certificates must be submitted annually. Grantees cannot begin grant activities for the program year until Serve Idaho has received documentation of the completed online NSCHC training.**

All applicants **must** undergo a National Service Criminal History Check (NSCHC) **BEFORE** the member starts service that. The NSCHC includes:

- A nationwide check of the National Sex Offender Public Web site (NSOPW) **must be completed through the approved AmeriCorps vendor Truescreen, including adjudication by program, the day BEFORE the individual begins service.**
- A name-based search of the state criminal registry in the state in which the grantee is operating **and** the state in which the individual resides at the time of application **must be completed including adjudication the day before the individual begins service.** This check must be conducted through the approved AmeriCorps vendor Truescreen.
- A fingerprint-based search of the Federal Bureau of Investigation through the AmeriCorps

approved vendor Fieldprint **must be completed and adjudicated the day before the individual begins service.**

**Who does not need to complete checks?**

- Members who begin service before the age of 18,
- Staff members on fixed amount grants,
- Staff members of planning grants,
- Staff members working on the grant who are not listed on the budget (either on the CNCS or grantee share),
- Consultants listed in the contractual and consultant services category of the budget (Section I.F).

**PROCEDURES:**

Potential members and cost reimbursement staff listed in the budget **may not start service**, including orientation and training hours, until the day after ALL checks are **completed and adjudicated by the program.**

**Utilizing Truescreen and Fieldprint (required for all grantees):**

All AmeriCorps state programs operating in Idaho must utilize the approved AmeriCorps vendor for NSOPW and State Checks ([Truescreen](#)) as well as the approved vendor for FBI fingerprint checks ([Fieldprint](#)).

When using Truescreen and Fieldprint, a check is not complete or compliant until the results have been adjudicated by the program. Adjudication of NSOPW and State checks must be completed in Truescreen the day before an individual's start on the grant. Adjudication of fingerprint checks must be completed in Fieldprint prior the day before an individual's start on the grant. Failure to adjudicate an individual's NSOPW, State or fingerprint checks prior to their start on the grant will result in a disallowance.

Details on how to run and adjudicate checks in Fieldprint and Truescreen can be found at [https://americorps.gov/sites/default/files/document/05\\_01\\_21\\_NSCHCUsingFieldprintandTruescreen\\_OM.pdf](https://americorps.gov/sites/default/files/document/05_01_21_NSCHCUsingFieldprintandTruescreen_OM.pdf).

An individual may begin service or work the day after the NSOPW, State check and FBI check have been adjudicated in Truescreen and Fieldprint by the program.

AmeriCorps has developed very thorough manuals and trainings on using Truescreen and Fieldprint. These resources are included below:

- [AmeriCorps National Service Criminal History Check Resource Page](#)
- [Step by Step Guide to Adjudicate in Fieldprint](#)
- [NSCHC Manual](#)
- NFF/Truescreen Waiver Table (found on the NSCHC Resource Page under NSCHC Guidance)
  - o Helps identify what checks are needed if a member's residence is outside of Idaho.
  - o If a member's residence is in Idaho, and they are serving in Idaho, only the NSOPW and Fieldprint FBI fingerprint are needed as the Idaho state name based check is included in the Fieldprint FBI results as Idaho is an NFF state.
- [NSCHC Frequently Asked Questions](#)

**NSCHC Waiver Request Procedure**

Effective May 1, 2021, AmeriCorps may waive provisions of NSCHC for good cause, or for any other lawful basis ([45 CFR §2540.207](#)). Programs can request a waiver by filling out this form on [Basecamp](#) and emailing it to the Serve Idaho Grants Officer. Serve Idaho will submit your request to AmeriCorps the Agency on your behalf and will let you know of their decision. If a waiver is approved, keep all documentation for the request in your program files in the event of an audit.

### **Using Criminal Background Results**

Results of any of the above-mentioned checks may only be used for determining eligibility for employment by an authorized employee of the agency who has been previously cleared by a criminal background check.

Grantees must retain the criminal history check results along with written documentation that they considered the results in selecting the individual and that the individual was notified that the position is contingent on the results.

Grantees should be mindful that arrests alone are mere allegations and actual criminal convictions are the relevant indicators of an individual's eligibility to serve. The program should document that they gave written notice, signed by the applicants, that the applicant has the right to review and challenge the results of the NSCHC, along with the steps to do so.

The law prohibits an individual from serving in a national service program in four situations:

- The individual refuses to consent to the criminal history check.
- The individual makes a false statement in connection with the criminal history check.
- The individual is registered or required to be registered as a sex offender.
- The individual has been convicted of first-degree murder as defined by federal law (18 USC 1111).

If the NSCHC returns results that implicate criteria other than those above, the grantee has the discretion to decide if the results disqualify an individual from service. Grantees should consider the nature and gravity of the offense, the time passed since the conviction or completion of the sentence and the nature of the position. Grantees must have written policies of their disqualification criteria.

### **Criminal History Check Compliance Monitoring Policy**

The Serve Idaho Grants Officer will review results of the Truescreen and Fieldprint checks on a weekly basis to ensure compliance. Fieldprint and Truescreen checks should be uploaded to the Member File in America Learns. Staff and member timesheets that don't track time in America Learns may be requested by the Grants Officer to verify start date. Members and staff should not begin tracking time on the grant or their AmeriCorps service until the day after both Fieldprint and Truescreen checks have been adjudicated by the program.

The Grants Officer will review all checks and will provide the program with an Excel spreadsheet that includes the following:

- Cleared: Member is eligible to Serve
- Awaiting Documentation

### **NSCHC Check List**

- Verify identity against government issued photo identification and keep in file.
- Pay for the checks.
- Perform and adjudicate the NSOPW and state checks in Truescreen the day before service/work begins.
- Perform and adjudicate the FBI check in Fieldprint the day before service/work begins.
- Consider individual results and adjudicate the State Check(s) FBI check
- Document notice of the opportunity for review and challenge of findings for Fieldprint check (this process is captured in the Truescreen system but not in Fieldprint)
- Maintain the results of the checks and when they were received in the file. Document that you verified identity and considered the results of the checks in the hiring decision for Fieldprint check (this process is captured in the Truescreen system but not in Fieldprint)

### **Criminal History Check Cost Disallowance**

In the case that a NSCHC is completed incorrectly or late, a program will be assessed a cost-based disallowance that will disallow staff salary, FICA, and member living allowance from the start date until the check is completed correctly.

Further information on the NSCHC disallowance can be found at CNCS Procedural Guidance for NSCHC Enforcement ([americorps.gov](http://americorps.gov)).

## **6. Nondiscrimination Laws**

All programs must comply with all applicable provisions of state and federal laws and Regulations pertaining to nondiscrimination, sexual harassment, and equal employment opportunity including, but not limited to, the following law and regulations and all the subsequent amendments thereto:

(a) An individual with responsibility for the operation of a project that receives AmeriCorps assistance must not discriminate against a participant in, or member of the staff of, such project on the basis of race, color, national origin, sex, age, or political affiliation of such participant or member, or on the basis of disability, if the participant or member is a qualified individual with a disability.

(b) Any AmeriCorps assistance constitutes Federal financial assistance for purposes of title VI of the Civil Rights Act of 1964 (42 U.S.C. 2000d et seq.), title IX of the Education Amendments of 1972 (20 U.S.C. 1681 et seq.), section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794), and the Age Discrimination Act of 1975 (42 U.S.C. 6101 et seq.), and constitutes Federal financial assistance to an education program or activity for purposes of the Education Amendments of 1972 (20 U.S.C. 1681 et seq.).

(c) An individual with responsibility for the operation of a project that receives AmeriCorps assistance may not discriminate on the basis of religion against a participant in such project or a member of the staff of such project who is paid with AmeriCorps funds. This provision does not apply to the employment (with AmeriCorps assistance) of any staff member of an AmeriCorps-supported project who was employed with the organization operating the project on the date the AmeriCorps grant was awarded.

(d) Grantees must notify all program participants, staff, applicants, and beneficiaries of:

- (1) Their rights under applicable federal nondiscrimination laws, including relevant

provisions of the national service legislation and implementing regulations; and

(2) The procedure for filing a discrimination complaint with the AmeriCorps Office of Civil Rights and Inclusiveness.

[59 FR 13808, Mar. 23, 1994, as amended at 73 FR 53752, Sept. 17, 2008]

## 7. Member Service Agreement

The standard member service agreement should be reviewed carefully to ensure that it contains the following items:

- Full text of the member position description;
- The minimum number of service hours and other requirements (as developed by the Program) necessary to successfully complete the term of service and to be eligible for the education award;
- Amount of the Segal AmeriCorps Education Award being offered for the member's successful completion of the term of service;
- Start and end dates of the member's term of service;
- Amount of the living allowance;
- How the member will be paid and at what frequency;
- Description of the other benefits available to the member;
- Standards of conduct and sanctions for improper conduct;
- Prohibited activities, including those specified in the regulations;
- Text of [45 CFR §2540.100\(e\)-\(f\)](#), which relates to nonduplication and nondisplacement;
- Text of [45 CFR §2520.40-.45](#), which relates to fundraising by members;
- Requirements under the Drug-Free Workplace Act (41 U.S.C. 701 et seq.);
- Civil rights requirements, complaint procedures, and rights of beneficiaries;
- Termination and suspension rules (including the specific circumstances under which a member can be released for cause);
- Full text of the program's grievance procedures;
- Any other program-specific requirements;
- Member signature and date on or before the same date the member begins their service;
- Program signature and date after the member has signed.

Refer to Basecamp for an [Outline for Member Service Agreements](#) that shows requirements as well as best practices for these agreements.

## 8. Member Orientation

Member orientation should prepare members for their year of service. Orientation can help them acquire the skills and knowledge they need to “get the job done”. A strong orientation will pay off in program outcomes, with members who know the purpose of their service and have the skills to accomplish program objectives. The AmeriCorps Member Orientation Checklist is as follows:

Listed below are items AmeriCorps **mandates** to be covered in the orientation of members:

- Member rights and responsibilities;
- Specific skills and knowledge to perform service;
- Program's code of conduct (May be included in member manual);
- Prohibited Activities (May be included in member manual);

- Drug Free Workplace (May be included in member manual);
- Suspension and Termination Rules;
- Grievance Procedures;
- Equal Opportunity, Affirmative Action, Non-Discrimination activities;
- Sexual Harassment Awareness Education;
- Specific Safety Procedures- member security;
- Sensitivity to the Community;
- Introduction to National Service and AmeriCorps;
- My AmeriCorps Portal;
- Timesheet Reporting (timesheets and approval process)

Listed below are items the Commission **strongly encourages** to be included in the orientation of members:

- Serve Idaho's role, mission, staff, trainings, website, Facebook, newsletter, member highlights;
- AmeriCorps Pledge;
- Training and Professional Development;
- Serve Idaho AmeriCorps Conference;
- National Days of Service;
- Resources;
- Basecamp;
- On3Learns;
- Loan Forbearance;
- Program rules, regulations, and benefits;
- Member handbook;
- Allowed activities;
- Living allowance;
- Staff and member roles;
- Understanding the objectives of the program and how to collect data;
- Eligibility of full-time members for Health Care/Childcare;
- Public Service Loan forgiveness;
- Idaho AmeriCorps Alum Chapter LinkedIn page.

## **9. Member Timesheets**

Members will track their time utilizing America Learns. All programs are required to use America Learns unless they get approval from Serve Idaho to use another system. America Learns provides one-on-one training for program directors on how to use the system. If you need training reach out to the Serve Idaho Project Coordinator for details on how to connect with America Learns directly for training.

AmeriCorps members may not enroll prior to the start date of the grant award. AmeriCorps members may not begin service prior to the beginning of the member enrollment period as designated in the grant award. A program may not certify any hours a member performs until the enrollment process is complete.



Serve Idaho will conduct random reviews of member timesheets throughout the program year. If problems are found during the initial review such as inconsistent calculations, unauthorized timesheets, prohibited activities, etc., it will be considered a compliance issue and may require a complete review of all member timesheets.

The review of timesheets will include the following:

- Is the timesheet signed by the member after the last date of entry?
- Is the timesheet signed by the site supervisor after the member?
- Is the timesheet signed by the program director after the site supervisor?
- Does the timesheet have the appropriate approvals marked?
- Are members on target to attain their intended number of service hours?
- Are service activities listed on timesheets in line with the approved objectives?
- Do service activities listed on timesheets include prohibited activities?
- Do the timesheets clearly track the service activities to ensure adherence to the 20% rule relating to training?
- Do the timesheets clearly track the service activities to ensure adherence to the 10% rule relating to fundraising?
- Are timesheets current?

## 10. Member Files

Programs must maintain a member file for each member in America Learns as well as a member file following their own organizational policies and procedures (whether that be electronically or as hard copies). The following items must be uploaded into the America Learns System:

- **Start Up Documentation**
  - Member Contract (signed before commencement of service);
  - Member Service Description;
  - Emergency Notification;
  - Media Release;
  - Documentation of Healthcare Enrollment or Waiver (if applicable);
  - Documentation of Childcare Enrollment (if applicable);
  - Documentation Loan Forbearance information was provided;
  - High School Diploma or Self Certification;
  - CPR Certification (if applicable);
  - Eligibility Forms;
  - Documentation of Citizenship ([See 45 CFR §2522.200 c, d and e](#));
  - NSCHC results and adjudication;
  - Application;
  - Parental Consent (if applicable)
- **Member Performance Documentation**
  - Performance Evaluations (Mid-Term and End of Term for Full-Time Members; End of Term for all less than Full-Time Members);
  - Documentation of Verbal Warnings and/or Written Warnings (if applicable).
- **Exit Documentation**
  - Exit Forms;
  - Health Insurance Exit Form (or documentation showing they were exited from AmeriCorps Health Insurance coverage);

- Documentation of Compelling Personal Circumstances (if applicable) ;
- Documentation of Release for Cause (if applicable);
- Change of Status/Change of Term

\*\* For programs not utilizing America Learns, all member files must be kept following your organizational policies and procedures. Files will need to be scanned and sent to the Grants Officer utilizing secure file transfer in advance of compliance monitoring. Additional details on how to complete this will be sent by the Grants Officer in advance of your monitoring visit.

## 11. Service Gear

Programs must provide gear to members and may utilize grant funds to cover costs. Programs should provide gear to members that is appropriate for their site and that can be worn daily. Items can be ordered online at <http://gooddeed.org/amicorps.aspx> or <https://www.nationalservicegear.org> or programs may choose to use a different vendor, using the [AmeriCorps Idaho logo found on Basecamp](#). The AmeriCorps Idaho logo is already on file at [4imprint](#) and at [In the Bag Promotions](#), Serve Idaho has utilized both and found them good to work with. When ordering gear, ensure that AmeriCorps branding guidelines are followed. Guidelines can be found at <https://americorps.gov/newsroom/communication-resources>.

## 12. Site Signage

All programs must have signage at all sites as per the grant terms and conditions. Signage must include:

- Prohibited Activities
- Indication that AmeriCorps members are serving at the location

Serve Idaho purchases signage for all programs and will provide it to you at your request. AmeriCorps members serving signage can be [found here on Basecamp](#) and prohibited activities signage can be [found here on Basecamp](#).

## 13. Material Request

Grant funds may be used to purchase informational material (brochures, application packets, posters, publications, etc.). On occasion, select items are free of charge. Items can be ordered online at [AmeriCorps | AmeriCorps Promotional Items](#)

## 14. Member Status

### Member Enrollment

All Member Enrollment Forms must be entered and approved in My AmeriCorps **within 8 calendar days of a member starting service in the program**. Members must create a My AmeriCorps Portal account in order to complete their enrollment.

Further information on the pre-enrollment and enrollment requirements can be found on [Basecamp](#).

### Assigning Members to Service Locations

The program is required to ensure that all operating sites and all service locations are entered in the My AmeriCorps portal for all members within 7 calendar days of the members' start date. The program is required to include the name of the service site, and the full physical address including zip-plus-four of the service locations where each member will be serving. If a member is serving at multiple service locations, the program must enter the site where the member serves the majority of his or her hours as

the member's primary assignment. Details on how to assign a member to a service location can be [found here](#).

### **Member Exit**

All Member Exit Forms **must** be entered and approved in My AmeriCorps **within 30 calendar days** of a member exiting the program. Members must create a My AmeriCorps Portal account in order to complete their exit information and to manage their education award. All members must complete their term of service within one year of their start date. This completion requirement is for all members. Members, who have had their term suspended, may increase their service agreement by the number of days suspended but not to exceed the Program year end date. Step by step details on how to complete a member exit in eGrants can be [found here](#).

### **Change of Status**

Any request to change a member's assignment information is defined as a status change request. There are four types of "status change" requests:

*Suspension:* You can suspend a member any time during the member's term. The effective date of the suspension must be after the member's start date and before the member's required completion date. Please note that members do not need to be suspended from one term to serve in another (concurrent) term. Only less-than-full-time members may serve concurrent terms that do not exceed one full-time term.

*Reinstatement:* Reinstating a member can occur any time after the member has been suspended. The effective date of the reinstatement must be after the effective date of the suspension and within two years of the effective date of the suspension.

*Transfer:* My AmeriCorps provides an easy process to transfer an active member from your program to another program or operating site. You don't need access to the new program to perform this action.

*Change Term of Service (slot type):* When changing a member's term of service, the program must have unfilled MSYs available that equal the MSYs associated with the new slot type. If additional MSYs are required, you may need to move slots within a program or transfer slots from one program to another. Transferring slots can be performed only by Serve Idaho.

Programs **must** have approval from Serve Idaho prior to entering and approving a Change of Status Form in My AmeriCorps. Programs shall submit a written request to get approval from Serve Idaho. Refer to the AmeriCorps Provisions for policy guidance.

### **AmeriCorps Member Release from Completing a Term of Service**

An AmeriCorps program may release a participant from completing a term of service for compelling personal circumstances, as determined by the program, or for cause.

#### **Release for Compelling Personal Circumstance [45 CFR §2522.230](#)**

Conditions attributable to the program or otherwise unforeseeable and beyond the participant's control, such as a natural disaster, pandemic, a strike, relocation of a spouse, or the nonrenewal or premature

closing of a project or program, that make completing a term unreasonably difficult or impossible;

**Those that AmeriCorps, has for public policy reasons, determined as such, including:**

- (A) Military service obligations;
- (B) Acceptance by a participant of an opportunity to make the transition from welfare to work; or
- (C) Acceptance of an employment opportunity by a participant serving in a program that includes in its approved objectives the promotion of employment among its participants.

**Compelling personal circumstances do not include leaving a program:**

- (i) To enroll in school;
- (ii) To obtain employment, other than in moving from welfare to work or in leaving a program that includes in its approved objectives the promotion of employment among its participants; or
- (iii) Because of dissatisfaction with the program.

**Suspension**

As an alternative to releasing a participant, an AmeriCorps State/National program may, after determining that compelling personal circumstances exist, suspend the participant's term of service for up to two years to allow the participant to complete service with the same or similar AmeriCorps program at a later time.

**Release for Cause**

1. A release for cause encompasses any circumstances other than compelling personal circumstances that warrant an individual's release from completing a term of service.
2. AmeriCorps programs must release for cause any participant who is convicted of a felony or the sale or distribution of a controlled substance during a term of service.
3. A participant who is released for cause may not receive any portion of the AmeriCorps education award or any other payment from the National Service Trust.
4. An individual who is released for cause must disclose that fact in any subsequent applications to participate in an AmeriCorps program. Failure to do so disqualifies the individual for an education award, regardless of whether the individual completes a term of service.
5. An AmeriCorps State/National participant released for cause may contest the program's decision by filing a grievance. Pending the resolution of a grievance procedure filed by an individual to contest a determination by a program to release the individual for cause, the individual's service is suspended. For this type of grievance, a program may not—while the grievance is pending or as part of its resolution—provide a participant with federally-funded benefits (including payments from the National Service Trust) beyond those attributable to service actually performed, without the program receiving written approval from AmeriCorps.
6. An individual's eligibility for a subsequent term of service in AmeriCorps will not be affected by release for cause from a prior term of service so long as the individual received a satisfactory end-of-term performance review as described in [§ 2522.220\(c\)\(2\)](#) for the period served in the first term.
7. Except as provided in paragraph (e) of this section, a term of service from which an individual is released for cause counts as one of the terms of service described in [§ 2522.235](#) for which an individual may receive the benefits described in [§ 2522.240](#) through [§2522.250](#).

## Suspended Service

1. A program must suspend the service of an individual who faces an official charge of a violent felony (e.g., rape, homicide) or sale or distribution of a controlled substance.
2. A program must suspend the service of an individual who is convicted of possession of a controlled substance.
3. An individual may not receive a living allowance or other benefits, and may not accrue service hours, during a period of suspension under this provision.

## Reinstatement

1. A program may reinstate an individual whose service was suspended under paragraph (c)(1) of this section § [2522.230](#) if the individual is found not guilty or if the charge is dismissed.
2. A program may reinstate an individual whose service was suspended under paragraph (c)(2) of section § [2522.230](#) only if the individual demonstrates the following:
  - (i) For an individual who has been convicted of a first offense of the possession of a controlled substance, the individual must have enrolled in a drug rehabilitation program;
  - (ii) For an individual who has been convicted for more than one offense of the possession of a controlled substance, the individual must have successfully completed a drug rehabilitation program.

## Release Prior to Serving 15 Percent of a Term of Service

If a participant is released for reasons other than misconduct prior to completing 15 percent of a term of service, the term will not be considered one of the terms of service described in § [2522.220](#)(b) for which an individual may receive the benefits described in § [2522.240](#) through § [2522.250](#).

## Term of Service Limit

- (a) *General limitation.* An individual may receive the benefits described in § [2522.240](#) through § [2522.250](#) for no more than four terms of service in an AmeriCorps State and National program, regardless of whether those terms were served on full-, part-, or reduced part-time basis.
- (b) *Early release.* Except as provided in paragraph (c) of section § [2522.235](#), a term of service from which an individual is released for compelling personal circumstances or for cause counts as one of the terms of service for which an individual may receive the benefits described in § [2522.240](#) through § [2522.250](#).

Note: If you make any changes to My AmeriCorps, you must add that same information to the member file. The My AmeriCorps system and the member files should include the same information.

## 15. Member Slots

The allowable slot types and associated FTEs are listed in the table below.

Service Term	Service Hours	MSY's
Full Time (FT)	1700	1
Three-Quarter Time (TQT)	1200	0.7
Half Time (HT)	900	.5
Reduced Half Time (RHT)	675	0.38095240
Quarter Time (QT)	450	0.26455027

Minimum Time (MT)	300	0.21164022
Abbreviated Time (AT)	100	.05627705

### Slot Conversions

Serve Idaho may approve occasional changes of currently enrolled members to lesser-term slots. The program must submit a written request to Serve Idaho for a slot conversion by completing the [slot conversion form found on Basecamp](#). Serve Idaho and the program must consider the impact on the program quality. AmeriCorps will not cover health care or childcare costs for less than full-time members.

Programs may not request a transfer of currently enrolled members to a lesser-term status simply to provide a pro-rated education award if the member would otherwise be released for cause. It is also not allowed to request to convert a slot to a lesser-term slot at the end of a member's term of service in order to award a pro-rated education award when the member has not completed the hours required by their original term.

Changing less than full-time members to a greater slot type is discouraged because it is very difficult to manage, unless done very early in the member's term of service. Serve Idaho may approve such changes only in extenuating circumstances if the program's current budget can accommodate such changes. The program must request the slot conversion in writing. Keep in mind that a member's minimum hours must be completed within 12 months of the member's original start date.

### Unfilled Slot Conversions

Programs must submit a request for an unfilled slot conversion in writing to Serve Idaho. Serve Idaho has 7 business days to review and complete slot conversions. For example, one full-time position can be converted to up to three, quarter-time positions. All conversions must be Trust neutral, are subject to availability of funds in the Trust, and must comply with all assumptions on which Trust prudence and continued solvency are predicated. The total number of MSYs and education award amounts in the grant may not increase as a result of the slot conversion.

For example:

- 1 full-time member position (1 MSY) may be converted into 2 half-time slots (2 x .5 members = 1 MSY).
- 1 full-time member position may not be converted into 4 quarter-time positions as the education awards would total more than the original (4 X .2646); in this example, the maximum number of allowable quarter-time positions would be 3.

Grantees may also combine and convert less than full-time positions to full-time positions if such changes do not increase the total MSYs or total education award amounts awarded in the grant.

### Refill Slots

Eligible AmeriCorps State and National programs that have fully enrolled their awarded member slots are allowed to replace any member who terminates service before completing 30 percent of his/her term provided the member who terminates is not eligible for and does not receive a pro-rated education award. **Programs may not refill the same slot more than once.**

As a fail-safe mechanism to ensure AmeriCorps resources are available in the national service trust to finance any member's education award, AmeriCorps will suspend refilling if either:

- Total AmeriCorps enrollment reaches 97 percent of awarded slots
- The number of refills reaches five percent of awarded slots.

## 16. Tutoring Requirements

A tutor is defined as someone whose primary goal is to increase academic achievement in reading or other core subjects through planned, consistent, one-to-one or small-group sessions and activities that build on the academic strengths of students in kindergarten through 12th grade, and target their academic needs.

A tutor does not include someone engaged in other academic support activities, such as mentoring and after-school program support, whose primary goal is something other than increasing academic achievement. For example, providing a safe place for children is not tutoring, even if some of the program activities focus on homework help.

### § [2522.940](#) – A program in which members engage in tutoring for children must:

- Articulate appropriate criteria for selecting and qualifying tutors, including the requirements in [§2522.910](#) of this subpart;
- Identify the strategies or tools it will use to assess student progress and measure student outcomes;
- Certify that the tutoring curriculum and pre-service and in-service training content are high-quality, and research based, consistent with the instructional program of the local educational agency or with State academic content standards;
- Include appropriate member supervision by individuals with expertise in tutoring;
- Provide specialized high-quality and research-based, member pre-service and in-service training consistent with the activities the member will perform;
- Curriculum must be consistent with both state academic standards and the instruction program of the local educational agency.
- Certify that members serving as tutors possess a minimum of a high school diploma.

### § [2522.920](#) – Exceptions to the qualifications requirements

The qualifications requirements in [§2522.910](#) of this subpart do not apply to a member who is a K–12 student tutoring younger children in the school or after school as part of a structured, school-managed cross-grade tutoring program.

## 17. Living Allowance

A program must provide full-time members a *minimum living allowance of \$17,600* per year with a maximum of \$35,200 per year.

A living allowance *is not required for less than full-time members*. If you choose to provide less than full-time members with a living allowance, you may use the following chart as a guide.

Term of Service	Minimum # of Hours	Minimum Total Living Allowance	Maximum Total Living Allowance	MSY
Full Time	1700	\$17,600	\$35,200	1
Three Quarter Time	1200	n/a	\$24,640	.70
Half Time	900	n/a	\$17,600	.50
Reduced Half Time	675	n/a	\$13,376	.3809524
Quarter Time	450	n/a	\$9,152	.26455027

Minimum Time	300	n/a	\$7,392	.21164022
Abbreviated Time	100	n/a	\$2,112	.05627705

## 18. Education Award

### Amount of the AmeriCorps Education Award

The amount of the AmeriCorps Education Award depends on the length of a member's term of service. The current amount of the Education Award for each term of service is as follows:

Enrollment Status	Hours	Award
Full Time	1700	\$6,895.00
Three Quarter Time	1200	\$4,826.50
Half Time	900	\$3,447.50
Reduced Half Time	675	\$2,626.27
Quarter Time	450	\$1,824.07
Minimum Time	300	\$1,459.26
Abbreviated Time	100	\$388.03

Payments made from AmeriCorps Education Award are considered taxable income in the year that AmeriCorps makes the payment to the school or loan holder. For the most current Education Award amounts, visit the [AmeriCorps Education Award website](#).

### Eligibility

Members are eligible for an AmeriCorps Education Award if they successfully complete their term of service in accordance with the member service agreement with an AmeriCorps State program.

For the member to use the AmeriCorps Education Award, they must have received a high school diploma, or the equivalent of such diploma.

### Award Limitations

Under no circumstances will an individual be eligible to receive more than an amount equal to the aggregate value of two full-time education awards. The *value* of an education award is equal to the actual amount of the education award received divided by the amount of a full-time education award in the year the AmeriCorps position to which the award is attributed was approved. Each award received will be considered to have a value between 0 and 1. Although the *amount* of a full-time award as defined in 45§ 2527.10 may change, the *value* of a full-time award will always be equal to 1.

The National Service Trust does not make payments to anyone other than qualified schools and loan holders. See your financial aid counselor for information on how they handle disbursements and reimbursements of the AmeriCorps Education Award.

Members have 7 years to use the education award from the date of their completion of service. They can divide up their award and use portions of it at different times, if it is for authorized expenditures within the specified time period. Members could, for example, apply a portion of it to existing qualified student loans and save the remainder to pay for authorized college costs in the future.



## **Transfer of the Education Award § 2530.30**

### **Request for Transfer**

Members who are 55 and older on their start date may transfer their education award. Before transferring an award to a designated individual, AmeriCorps must receive a request from the transferring individual, including—

- (1) The individual's written authorization to transfer the award, the year in which the award was earned, and the specific amount of the award to be transferred;
- (2) Identifying information for the individual designated to receive the transferred award;
- (3) A certification that the transferring individual meets the requirements of paragraphs (a) through (c) of 45 CFR§ 2530.10; and
- (4) A certification that the designated individual is the child, grandchild, or foster child of the transferring individual.

### **Notification to Designated Individual**

Upon receipt of a request including all required information listed above, AmeriCorps will contact the designated individual to notify the individual of the proposed transfer, confirm the individual's identity, and give the individual the opportunity to accept or reject the transferred award.

### **Acceptance by Designated Individual**

To accept an award, a designated individual must certify that the designated individual is the child, grandchild, or foster child of the transferring individual and that the designated individual is a citizen, national, or lawful permanent resident alien of the United States. Upon receipt of the designated individual's acceptance, AmeriCorps will create or permit the creation of an account in the National Service Trust for the designated individual, if an account does not already exist, and the accepted amount will be deducted from the transferring individual's account and credited to the designated individual's account.

### **Timing of Transfer**

AmeriCorps must receive the request from the transferring individual prior to the date the award expires.

For additional information about the Education Award please contact the National Service Trust at 1-800-942-2677 or visit [Segal AmeriCorps Education Award | AmeriCorps](#).

### **Segal Education Award – College/University Match**

For a list of institutions that match the Segal AmeriCorps Education Award visit: [Schools of National Service search | AmeriCorps](#).

## **19. Child Care**

The AmeriCorps Child Care Benefit Program is available for qualified, active, full-time AmeriCorps State and National Corps Members who need the benefit to serve; eligibility requirements are listed below.

## Requirements:

- (1) Need. A participant is considered to need childcare in order to participate in the program if:
  - (i) Is the parent or legal guardian of, or is acting in loco parentis for, a child under 13 who resides with the participant;
  - (ii) Has a family income that does not exceed 75 percent of the State's median income for a family of the same size;
  - (iii) At the time of acceptance into the program, is not currently receiving childcare assistance from another source, including a parent or guardian, which would continue to be provided while the participant serves in the program; and
  - (iv) Certifies that he or she needs childcare in order to participate in the program.
- (2) Provider eligibility. Eligible childcare providers are those who are eligible childcare providers as defined in the Child Care and Development Block Grant Act of 1990 (42 U.S.C. 9858n(6)).
- (3) Childcare allowance. The amount of the child-care allowance may not exceed the applicable payment rate to an eligible provider established by the State for childcare funded under the Child Care and Development Block Grant Act of 1990 (42 U.S.C. 9858c(4)(A)).
- (4) AmeriCorps share. AmeriCorps will pay 100 percent of the childcare allowance, or, if the program provides childcare through an eligible provider, the actual cost of the care or the amount of the allowance, whichever is less.

The criteria for member eligibility are contained in [45 C.F.R. §2522.250](#).

### **Childcare is provided by:**

GAP Solutions Inc.

Toll-Free number (855) 886-0687

EMAIL: [AmeriCorpsChildCare@gapsi.com](mailto:AmeriCorpsChildCare@gapsi.com)

Send mail inquires:

ATTN: AmeriCorps Childcare Program

205 Van Buren St.

Ste. 205

Herndon, VA 20170

Visit <https://www.americorpschildcare.com/> for the Child Care Application as well as specific information regarding the childcare benefits.

## **20. Health Insurance**

Programs must provide healthcare coverage to all eligible participants who meet the following requirements:

1. Is a full-time member;
2. Is not otherwise covered by a health benefits package providing minimum benefits established by AmeriCorps at the time he or she is accepted into a program;
3. If, as a result of participation, or if, during the term of service, a participant demonstrates loss of coverage through no deliberate act of his or her own, such as parental or spousal job loss or disqualification from Medicaid, the participant will be eligible for health care benefits.

Programs may provide health insurance to less-than-full-time members serving in a full-time capacity, but they are not required to do so. A member is serving in a full-time capacity when the regular term of service will involve performing service on a normal full-time schedule for a period of 6 weeks or more. A member may be serving in a full-time capacity without regard to whether their agreed term of service will result in a full-time Segal AmeriCorps Education Award.

AmeriCorps will not cover healthcare costs for family members.

Any of the following health insurance options will satisfy the requirement for health insurance for full-time AmeriCorps members (or less than full-time members serving in a full-time capacity): staying on parents' or spouse's plan; insurance obtained through the Federal Health Insurance Marketplace of at least the Bronze level plan; insurance obtained through private insurance broker; Medicare or military benefits. AmeriCorps programs purchasing their own health insurance for members must ensure the plan meets minimum essential coverage (MEC) requirements of the Affordable Care Act.

If coverage is being provided via the Healthcare Marketplace, and thus third-party payment is not an option, programs must develop a process to reimburse members for monthly premiums. Reimbursements for health insurance premiums are considered taxable income for the member, and programs must have a way to document such reimbursements.

Programs should develop policies detailing how they will ensure members have health insurance coverage that is compliant with AmeriCorps Regulations. Sections of both the Member Handbook and the Member Service Agreement should address healthcare.

For further resources please see the following:

[2023 Terms & Conditions for AmeriCorps State & National Grants](#)

[AmeriCorps State and National Member Health Care FAQs May 2014](#)

## **20. Loan Forbearance**

AmeriCorps members who are earning a Segal AmeriCorps Education Award are uniquely eligible for one type of postponement of the repayment of their qualified student loan called forbearance. During the forbearance period, interest on the principal amount of the loan continues to accrue. If a member successfully completes their term of service and earns an Education Award, the National Service Trust will pay all or a portion of the interest that has accrued on the qualified student loans during this period. This accrued interest paid by the Trust, like the Segal AmeriCorps Education Award itself, is subject to income taxes.

AmeriCorps members enrolled in an AmeriCorps project are eligible for forbearance for most federally backed student loans. For other types of student loans, members must ask their loan holder if their AmeriCorps service qualifies for a deferment or forbearance.

This postponement of the student loan payment (forbearance) is not automatic. Members must request it from their loan holders by completing the National Service Forbearance Request Form. Members may complete the Forbearance Request Form online by accessing their My AmeriCorps Portal.

The National Service Trust does not grant forbearances. Loan holders do. The Trust merely verifies membership in AmeriCorps and forwards the documents to the loan companies. The Trust can verify membership only when it has proof from a project that the individual is an AmeriCorps member.

### **Interest Accrual Payments**

AmeriCorps members who have earned a Segal AmeriCorps Education Award are eligible to have the Trust pay up to 100% of the interest that accrued on their qualified student loan during their service. To have the Trust pay all or a portion of the interest accrued on a qualified student loan, the Trust must receive verification from the Program indicating the member has completed their service and is eligible for an award.

A member must log on to their account in My AmeriCorps. On the home page, they must click on the “Create Interest Accrual” link. The member must then follow the instructions, select the appropriate term of service and type of loan. Then, identify the holder of the student loan. Once the member follows these steps and clicks “submit,” a notice is sent electronically to their loan company. A record of the request will appear in the account home page. The loan holder certifies and submits the payment request electronically to the National Service Trust for payment.

### **Defaulted Loans**

Most student loans that are in default are not eligible for forbearance. If a member has loans that have gone into default before they begin their AmeriCorps service, they can attempt to negotiate an arrangement with the loan holder or collection agency to bring the loan out of default so forbearance can be granted and interest paid.

### **Public Service Loan Forgiveness**

The Public Service Loan Forgiveness (PSLF) Program is intended to encourage individuals to enter and continue to work full-time in public service jobs. Under this program, individuals may qualify for forgiveness of the remaining balance due on their William D. Ford Federal Direct Loan Program (Direct Loan Program) loans after they have made 120 qualifying payments on those loans while employed full-time by certain public service employers. Full-time AmeriCorps terms of service count toward the public service employment requirements for this program.

Visit the [Public Service Loan Forgiveness](#) website for more information.

### **My AmeriCorps Portal**

In order to prevent a delay in the processing of interest payments, individuals must request payments electronically using AmeriCorps on-line system, My AmeriCorps. This is a secure method for requesting interest payments to be remitted to your loan holders. It also provides electronic records of payments requested and paid and there are no forms to mail in.

AmeriCorps cannot guarantee the prompt and accurate processing of requests for interest payments using paper forms. Payments requested by paper can take up to 6 months or more for processing and are less secure.

It is fast and easy to access your National Service Participant account in My AmeriCorps. To register, go to <https://my.americorps.gov/mp/login.do> and click on “Register to create a new Member/Alum account” and follow the instructions.

## 21. Prohibited Activities

AmeriCorps acknowledges that religious and political activities play a positive role in healthy communities, that religion and politics are defining characteristics of many community organizations (faith-based and secular), and that religious and political belief and action are central to many AmeriCorps members' lives.

However, it is important that AmeriCorps programs and their members do not appear to be taking sides religiously or politically. Consequently, several limitations on the activities that AmeriCorps programs can support and in which members can engage while earning service hours, or when otherwise, representing AmeriCorps must be imposed. AmeriCorps members are free to pursue these activities on their own initiative, on non-AmeriCorps time, and using non-AmeriCorps funds.

The AmeriCorps logo should not be worn by members when participating in 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 AmeriCorps, staff and members may not engage in the following activities, and the grantee may not use grant funds to support the following activities:

- (1) Attempting to influence legislation;
- (2) Organizing or engaging in protests, petitions, boycotts, or strikes;
- (3) Assisting, promoting, or deterring union organizing;
- (4) Impairing existing contracts for services or collective bargaining agreements;
- (5) Engaging in partisan political activities, or other activities designed to influence the outcome of an election to any public office;
- (6) 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;
- (7) 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;
- (8) 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 except that nothing in this section 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) of this section, unless AmeriCorps assistance is not used to support those religious activities;
- (9) Conducting a voter registration drive or using AmeriCorps funds to conduct a voter registration drive;
- (10) Providing abortion services or referrals for receipt of such services; and
- (11) Such other activities as AmeriCorps may prohibit.

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-AmeriCorps funds. Individuals should not wear the AmeriCorps logo while doing so.

## **22. Allowable Activities**

After reading the list of prohibited activities there may still be questions about what kind of service work can be credited to AmeriCorps Education Award hours.

**The most important piece of information to relay to the members is that at least 80% of their time must be spent doing direct service, of which 10% can be spent fundraising. The other 20% can be credited to education and/or training they receive that relates to their service or to AmeriCorps.**

**Direct service** is work that addresses human need, the environment, public safety, and/or education in one form or another. It is working directly with people to make change or doing work that is involved in making that direct change. It can be outreach, case management, training, teaching, tutoring, mediating, counseling, recruiting volunteers, catching up on paperwork related to clients, preparing for class, coaching, listening, cooking, serving, providing health care, food, clothing, etc. Direct service hours should constitute 80% or more of an AmeriCorps member's total hours served. The remainder will be indirect service hours.

**Indirect service** hours, or education and training, hours are only applicable when they reflect the AmeriCorps service that the member credits to the education award he or she will receive. Any on-the-job training that refers to direct service would be part of this category. All orientations, including the AmeriCorps orientation, would be included, as well as any state or regional trainings, seminars, or workshops pertaining to issues related to direct service. Examples would be conflict resolution seminars, teacher development days, team-building exercises or a class on training techniques. Only 20% of the member's credited service hours can be dedicated to education and training, even if more hours have been spent in this area.

### **Fundraising Activities § [2520.40](#)**

AmeriCorps members may raise resources directly in support of your program's service activities.

Examples of fundraising activities AmeriCorps members may perform include, but are not limited to, the following:

- (1) Seeking donations of books from companies and individuals for a program in which volunteers teach children to read;
- (2) Writing a grant proposal to a foundation to secure resources to support the training of volunteers;
- (3) Securing supplies and equipment from the community to enable volunteers to help build houses for low-income individuals;
- (4) Securing financial resources from the community to assist in launching or expanding a program that provides social services to the members of the community and is delivered, in whole or in part, through the members of a community-based organization;
- (5) Seeking donations from alumni of the program for specific service projects being performed by current members.

AmeriCorps members may not engage in the below activities directly or indirectly by recruiting, training or managing others for the primary purpose of engaging in one of the activities listed below:

- (1) Raise funds for living allowances or for an organization's general (as opposed to project)

operating expenses or endowment;

(2) Write a grant application to AmeriCorps or to any other Federal agency.

### **23. Teleservice Policy**

The purpose of this policy is to provide the structure needed for effective implementation and operation of teleservice. Teleservice is a term used for AmeriCorps as it relates to “telework,” serving or working from home or off-site from the member’s normal service location where a supervisor is unable to physically be present to verify hours. AmeriCorps the Agency strongly discourages teleservice, but there may be rare situations when it is appropriate. As of January 8, 2023, AmeriCorps the Agency issued a new Teleservice Policy that states:

“AmeriCorps State and National recognizes the COVID-19 pandemic changed the landscape of work and service in our communities across the country in a permanent manner. ASN also recognizes that adapting to the changing nature of work/service is necessary as the program moves forward, while it maintains and upholds its program’s place-based element of service and limits risk. This policy addresses the parameters by which ASN grantees determine whether their AmeriCorps member can teleserve. This policy replaces Policy 2017.01: AmeriCorps State and National Guidance - Teleservice dated January 19, 2017.

Members requesting teleservice arrangements under the auspices of reasonable accommodation of a disability are excluded from this policy, as those requests are covered under other laws and policies.

The following guidance is provided for those situations in which a grantee determines that teleservice is appropriate or when a number of a member’s service hours can properly be accrued through teleservice. Teleservice is appropriate only when the activity can be meaningfully supervised, and the hours verified independently. If a grantee or subgrantee determines that its AmeriCorps members will be allowed to teleserve, the grantee must establish a policy that addresses the following:

- Written authorization of teleservice in advance
- Expectations of the communication requirements between supervisors and teleserving members
- Mitigation of the increased risk of time and attendance abuse
- Appropriate supervision including validation of the activities to be performed, and
- Verification of hours claimed.

Further, the grantee should consider updating its insurance coverage to address legal liability attribution (for the grantee or teleserving member) for incidents that occur during teleservice.

Grantee or subgrantees should be aware that their staff may be subject to legal sanctions for erroneously certifying that AmeriCorps members have sufficient valid service hours to complete their terms of service. In addition, there are legal penalties for knowingly submitting false claims to the government.

Remote service is NOT permitted under the AmeriCorps State and National program. Remote service is defined as an arrangement in which an AmeriCorps State and National member is not located within the commuting area of the geographic community where the service is to occur and is not expected to be physically present at the service site and/or community events.

Virtual service sites are NOT permitted under the AmeriCorps State and National Program. Virtual service sites refer to organizations that do not have a physical location.

No additional approvals are required by the Office of Regional Operations for such arrangements. However, if ASN grantees decide to allow teleservice, they must establish a teleservice policy, be able to produce it upon request, and demonstrate fidelity with the policy.”

Please reach out to Serve Idaho if you have any questions about this policy.

## **Member Supervision**

### **1. Grievance Procedure**

All programs must establish a grievance procedure for members who believe that they have been unfairly released from the program and for other grievances filed by members or other interested parties. This grievance procedure should be attached to or part of the AmeriCorps member's service agreement. The procedure must include an opportunity for a hearing and binding arbitration within statutory deadlines. If the grievance alleges fraud or criminal activity, it must immediately be brought to the attention of AmeriCorps Inspector General.

To ensure all AmeriCorps programs are following federal regulations regarding grievance procedures, member files will be reviewed during desk audits to ensure members have signed a grievance policy. Programs will be notified in writing of any required changes and given an appropriate time frame to complete those revisions.

Additionally, Serve Idaho encourages programs to establish an alternative dispute resolution procedure, such as mediation. While a member is going through the grievance procedure, be sure to make it very clear what stage they are in, what the timeline is, and what the next steps are (i.e. whether they are in a mediation, grievance hearing or binding arbitration).

The following illustrates the timeframe that **must** be addressed in an AmeriCorps grievance procedure as outlined in [45 CFR § 2540.230](#)

#### **Alternative dispute resolution**

(1) The aggrieved party may seek resolution through alternative means of dispute resolution such as mediation or facilitation. Dispute resolution proceedings must be initiated within 45 calendar days from the date of the alleged occurrence. At the initial session of the dispute resolution proceedings, the party must be advised in writing of his or her right to file a grievance and right to arbitration. If the matter is resolved, and a written agreement is reached, the party will agree to forego filing a grievance in the matter under consideration.

(2) If mediation, facilitation, or other dispute resolution processes are selected, the process must be aided by a neutral party who, with respect to an issue in controversy, functions specifically to aid the parties in resolving the matter through a mutually achieved and acceptable written agreement. The neutral party may not compel a resolution. Proceedings before the neutral party must be informal, and the rules of evidence will not apply. Apart from a written and agreed upon dispute resolution agreement, the proceeding must be confidential.

#### **Grievance procedure for unresolved complaints**

If the matter is not resolved within 30 calendar days from the date the informal dispute resolution process began, the neutral party must again inform the aggrieving party of his or her right to file a formal grievance. In the event an aggrieving party files a grievance, the neutral may not participate in the formal complaint process. In addition, no communication or proceedings of the informal dispute resolution process may be referred to or introduced into evidence at the grievance and arbitration



hearing. Any decision by the neutral party is advisory and is not binding unless both parties agree.

### **Time limitations**

Except for a grievance that alleges fraud or criminal activity, a grievance must be made no later than one year after the date of the alleged occurrence. If a hearing is held on a grievance, it must be conducted no later than 30 calendar days after the filing of such grievance. A decision on any such grievance must be made no later than 60 calendar days after the filing of the grievance.

### **Arbitration**

#### **(1) Arbitrator**

(i) *Joint selection by parties.* If there is an adverse decision against the party who filed the grievance, or 60 calendar days after the filing of a grievance no decision has been reached, the filing party may submit the grievance to binding arbitration before a qualified arbitrator who is jointly selected and independent of the interested parties.

(ii) *Appointment by AmeriCorps.* If the parties cannot agree on an arbitrator within 15 calendar days after receiving a request from one of the grievance parties, AmeriCorps Chief Executive Officer will appoint an arbitrator from a list of qualified arbitrators.

#### **(2) Time Limits**

(i) *Proceedings.* An arbitration proceeding must be held no later than 45 calendar days after the request for arbitration, or, if the arbitrator is appointed by the Chief Executive Officer, the proceeding must occur no later than 30 calendar days after the arbitrator's appointment.

(ii) *Decision.* A decision must be made by the arbitrator no later than 30 calendar days after the date the arbitration proceeding begins.

#### **(3) The cost**

The cost of the arbitration proceeding must be divided evenly between the parties to the arbitration. If, however, a participant, labor organization, or other interested individual prevails under a binding arbitration proceeding, the State or local applicant that is a party to the grievance must pay the total cost of the proceeding and the attorney's fees of the prevailing party.

### **Suspension of placement**

If a grievance is filed regarding a proposed placement of a participant in a program that receives assistance under this chapter, such placement must not be made unless the placement is consistent with the resolution of the grievance.

### **Remedies**

Remedies for a grievance filed under a procedure established by a recipient of AmeriCorps assistance may include

(1) Prohibition of a placement of a participant; and

(2) In grievance cases where there is a violation of non-duplication or non-displacement requirements and the employer of the displaced employee is the recipient of AmeriCorps assistance

(i) Reinstatement of the employee to the position he or she held prior to the displacement;

(ii) Payment of lost wages and benefits;

(iii) Re-establishment of other relevant terms, conditions and privileges of employment; and

(iv) Any other equitable relief that is necessary to correct any violation of the non-duplication or non-displacement requirements or to make the displaced employee

whole.

### **Suspension or termination of assistance**

AmeriCorps may suspend or terminate payments for assistance under this chapter.

### **Effect of noncompliance with arbitration**

A suit to enforce arbitration awards may be brought in any Federal district court having jurisdiction over the parties without regard to the amount in controversy or the parties' citizenship.

Serve Idaho will ensure that grievance procedures address each of the following required components:

- Grievance filed within one year of alleged occurrence.
- Grievance hearing within 30 calendar days of filing a grievance.
- Decision made within 60 calendar days of filing a grievance.
- Hearing by person not involved in previous decisions on the issue.
- Grievant can request binding arbitration if decision is averse to grievant or if decision is not reached within 60 calendar days.
- Binding arbitration hearing is held within 45 days after request for arbitration or within 30 days after CEO appoints arbitrator.
- There is a decision within 30 days of the binding arbitration hearing.
- Remedies include the applicant's selection or reinstatement and other changes in the terms and conditions of service.

### **The programs are accountable for making any needed revisions in their grievance procedure.**

In formatting your own grievance procedure please see the AmeriCorps Provisions to make sure your grievance procedure follows appropriate guidelines.

**NOTE:** Programs are **required** to contact Serve Idaho within 2 business days if a member starts a grievance procedure process. The written grievance should be sent to Serve Idaho and any correspondence with the member should also be included.

## **2. Fraternization**

Relationships between members and staff members (including volunteers and contract personnel) of AmeriCorps, Serve Idaho, and host sites that are exploitative or otherwise inappropriate, or that have the appearance of partiality, preferential treatment, or the improper use of position for personal gain, are prejudicial to the morale of members and will not be tolerated.

Inappropriate relationships between members and the aforementioned staff members are prohibited. Inappropriate relationships are those that compromise, or appear to compromise, supervisory authority, impede the ability for members to perform their duties, or could result in preferential treatment. Relationships are prohibited if they appear to involve the improper use of rank or position for personal gain.

## **3. Distinction between Members and Employees**

Members are not employees of AmeriCorps, except for very specific purposes. In addition, members are not, for any purposes, employees of the program or the site where they serve. Members have no legal employment relationship with the program or the host site.

Although the host site supervisor provides day-to-day direction and guidance to the AmeriCorps member,

the member is not an employee of the program or the host site. One of the challenges of hosting members is ensuring that everyone who interacts with them understands they are with your organization for a very specific purposes and not as “general help.”

Some ways in which supervising members is similar to supervising employees include:

- Members are expected to act in a professional manner and conduct themselves in accordance with the workplace norms of your organization.
- Members are subject to the same or similar working conditions as their colleagues and should be oriented to the organization’s policies and given any standard staff training at the beginning of the service term.
- Members should be included in staff meetings for their department and organization.
- Supervisors should give members appropriate feedback on their performance.

Some ways in which supervising members is different from supervising employees are:

- Members are enrolled in national service, and they commit to serving in the community focused on the goals of the assigned project.
- Members are often early in their career and may need extra guidance and support in adjusting to the organization’s workplace norms and establishing professional working habits.
- As part of service, members have access to limited benefits and are often interested in cultivating an experience that is meaningful both professionally and personally. They may be interested in more coaching, mentoring, and professional development than the average employee. They also may have a deeper appreciation for recognition from your organization and community.
- Members may need extra support integrating into the organization and community quickly and effectively. They need to transition quickly in order to make a difference during their term.
- Members may be anxious about finances as well as what their next step will be once their service term ends.
- Some members may have years of experience in the workplace and see their service as an opportunity to transition to a new career field or give back after retiring from employment.

## **4. Member Service Evaluations**

The recipient must conduct and keep a record of at least a midterm and an end-of-term written evaluation of each member’s performance for fulltime members and an end-of-term written evaluation for all less-than-full-time members. The end-of-term evaluation should address, at a minimum, the following factors:

1. Whether the member has completed the required number of hours;
2. Whether the member has satisfactorily completed assignments; and;
3. Whether the member has met other performance criteria that were clearly communicated at the beginning of the term of service.

## **5. Jury Duty**

The grantee must allow AmeriCorps members to serve on a jury without being penalized for doing so. During the time AmeriCorps members serve as jurors, they should continue to receive credit for their normal service hours, a living allowance, healthcare coverage and, if applicable, childcare coverage regardless of any reimbursements for incidental expenses received from the court.

## **6. Drug-Free Workplace**

In accordance with the AmeriCorps Provisions, programs are required to give notice about the Drug-Free Workplace Act to members and to conduct a drug-free awareness program. If a member is arrested for or convicted of a drug offense, he or she must notify the Program Director in writing within 5 business days. Appropriate action must be taken including suspension and referral to a

drug rehabilitation program, or release for cause consistent with AmeriCorps rule on termination and suspension of service. The conviction **must be reported to Serve Idaho**, in writing, within 10 business days. Serve Idaho will then notify AmeriCorps in writing.

## Public Assistance Programs

### 1. Supplemental Nutrition Assistance Program (SNAP)

A member's SNAP benefits are not affected because a member receives the AmeriCorps living allowance. This means that a member's benefits should not be decreased, increased, or terminated because he or she receives the living allowance. This is a federal rule and is the same in all states.

Additionally, Idaho Administrative Procedures Act (IDAPA) 406. 28. P.L. 101-610 and P. L. 103-82 includes as income excluded by Federal law when computing SNAP eligibility: "Allowances, earnings, and payments to persons participating in programs under the National and Community Services Act. The exclusion applies to all payments made under the AmeriCorps program."

<https://adminrules.idaho.gov/rules/2011/16/0304.pdf>

Visit [Idaho Department of Health & Welfare's website](#)

for more information regarding SNAP benefits. More information regarding SNAP benefits can be found on the [member Basecamp page](#).

### 2. Public Housing

AmeriCorps members' benefits do not affect a member's eligibility for federal, need-based housing assistance, such as Section 8 housing and other federally subsidized housing. This means that the living stipend cannot be taken into consideration when a member applies for or if a member's eligibility for public housing is being re-examined. This is a federal rule and is the same in all states. You can find HUD Income Exclusion information on the [Federal Register](#).

### 3. Unemployment Benefits

AmeriCorps members are **not entitled** to unemployment benefits. AmeriCorps has interpreted federal legislation to mean that there is no employer-employee relationship between members and programs. Programs are not required to pay unemployment taxes.

### 4. Temporary Assistance for Families (TAFI)

Temporary Assistance for Families (TAFI) is a block grant program provided under the Social Security Act (SSA) and provides temporary cash benefits for eligible low-income families and households to help pay for food, clothing, shelter, and other essentials. Because TAFI is under the SSA, the AmeriCorps State and National living allowance may be considered income for the purposes of determining eligibility for and the amount of aid under TAFI. Visit [Idaho Department of Health & Welfare's website](#) for more information regarding TAFI.

### 5. Supplemental Social Security

Supplemental Security Income (SSI) is a federal program that provides a monthly cash benefit to low-income individuals who are aged, blind, or who have a disability. Prior to the passage of the Heroes Earnings and Relief Tax Act of 2008 (HEART Act), receiving an AmeriCorps living allowance could disqualify an individual from eligibility. Under the HEART Act, the Social Security Administration will ignore an individual's receipt of AmeriCorps benefits for purposes of SSI

eligibility. The Heart Act excludes “any benefit (whether cash or in-kind)” and so covers the living allowance, health insurance, childcare, and the education award (and related interest payments).

Additionally, SSI recipients who serve in AmeriCorps State and National and National Civilian Community Corps automatically qualify for the Student Child Earned Income Exclusion if they meet applicable age and marital status requirements.

SSI recipients who are

1. under the age of 22 regularly attending school and;
2. neither married nor the head of a household are eligible for the student earned income exclusion, which excludes from countable earned income \$794 per month for an individual and \$1,191 for a couple (amounts effective January 1, 2021).

This exclusion may be combined with existing SSI work incentives and other income disregard rules, which should encourage more young people with disabilities to participate in AmeriCorps State and National and NCCC.

Any portion of an education award used by an SSI recipient to pay for tuition, fees, and other necessary education expenses (not including room and board or repaying student loans) will not count as income. Any portion of the education award that is not used for tuition, fees, or other necessary educational expenses counts as income in the month that it is used. For general questions about SSI or the terms used in this answer, go to <http://www.socialsecurity.gov/ssi/index.htm>.

## **Reporting and Records Retention**

**Financial Management Provisions, Administrative Costs, Liability Insurance Coverage, and Termination of the Grant** – Please refer to the AmeriCorps Provisions.

### **Fraud Awareness Course Requirement**

AmeriCorps has launched a new online course in [Litmos on Fraud Awareness](#). The goal of this course is to demonstrate how to effectively mitigate the risks of fraud associated with AmeriCorps grants through better prevention, detection, and reporting measures. Each program is required to have one fiscal representative take this course annually and send their certificate of completion to Serve Idaho.

## **1. Match**

Programs must meet proposed match on every submitted Periodic Expense Report (PER) (either monthly or quarterly).

Programs that are not meeting proposed levels of match on their PERs should include the following comments in their Periodic Expense Report (PER) and Federal Financial Report (FFR):

1. An explanation as to why match was not met, and
2. Plans to meet match on the next PER.

Programs that do not meet match requirements and do not include comments in their PER and FFR reports will be required to submit a letter addressing the two issues noted above.

AmeriCorps funds may be reduced by Serve Idaho for failure to meet the minimum match requirements.

Cash or in-kind matching contributions that exceed the required minimum (regulatory amount) will be considered voluntary cost share. Programs that cannot meet the amount of voluntary cost share (budgeted amount) proposed in their application must submit to Serve Idaho an email explaining why the budgeted cost share cannot be met.

The cost share/match cannot be reduced below the minimum percentage requirements as indicated below:

**Regulatory Match**

Subject to the requirements of § [2521.45](#), your overall share of program costs will increase as of the fourth consecutive year that you receive a grant, according to the timetable below:

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
<b>Minimum Overall Share</b>	24%	24%	24%	26%	30%	34%	38%	42%	46%	50%

The program must have contributed matching resources by the end of a grant period in an amount equal to the combined total of the budgeted or regulatory annual match for each year of the grant period.

**Alternative Match**

If your program is unable to meet the match requirements and is located in a rural or a severely economically distressed community, you may apply to AmeriCorps for a waiver that would require you to increase the overall amount of your share of program costs beginning in the seventh consecutive year that you receive a grant. Contact Serve Idaho if you believe you meet the requirements and are interested in applying. If you receive the alternative match you will follow the timetable below:

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
<b>Minimum Overall Share</b>	NA	NA	NA	NA	NA	NA	29%	31%	33%	35%

**Administrative/Indirect Costs (Corporation Fixed Percentage)**

Programs may bill a maximum 5.26% of AmeriCorps funds expended in the operation of the program to the administrative/indirect costs line of the budget. However, Serve Idaho will retain 1.05% of the federal funds available to programs for administrative costs. The calculations are as follows:

**1. To Determine the CNCS Share:**

$$([\text{Section I CNCS}] + [\text{Section II CNCS}] \times 0.0526) \times (0.80) = \text{Corporation fixed amount}$$

**$([\text{Section I CNCS}] + [\text{Section II CNCS}] \times 0.0526) \times (0.20) = \text{Commission fixed amount}$**

**2. To determine the Grantee share:**

**$[\text{Total amount of Section I}] + [\text{Total amount of Section II}] \times .10 = \text{Corporation fixed amount.}$**

**The Commission fixed amount for the grantee share will be \$0.**

Serve Idaho will check the administrative cost calculations with each submitted reimbursement request. If the 5.26% or 10% is exceeded an adjustment on the reimbursement request will be required before the reimbursement request is processed.

**Administrative/Indirect Costs Federally Approved Indirect Cost Rate**

If you have a federally approved indirect cost rate, the rate will constitute documentation of your administrative costs, including the 5% maximum payable by AmeriCorps. Specify the Cost Type for which your organization has current documentation on file, i.e., Provisional, Predetermined, Fixed, or Final indirect cost rate. Supply your approved IDC rate (percentage) and the base upon which this rate is calculated (direct salaries, salaries and fringe benefits, etc.).

**1. Determine the base amount of direct costs to which you will apply the IDC rate, including both the CNCS and Grantee shares, as prescribed by your established rate agreement (i.e., based on salaries and benefits, total direct costs, or other). Then multiply the appropriate direct costs by the rate being claimed. This will determine the total amount of indirect costs allowable under the grant.**

**2. To determine the CNCS share: Multiply the sum of the CNCS funding share in Sections I and II by 0.0526. This is the maximum amount you can claim as the CNCS share of indirect costs.**

**3. To determine the Grantee share: Subtract the amount calculated in step 1 (the CNCS administrative share) from the amount calculated in step 2 (the Indirect Cost total). This is the amount the applicant can claim as grantee share for administrative costs.**

**2. Budget Modifications**

Serve Idaho understands that AmeriCorps programs must sometimes modify their budget during the program year. These budget modification guidelines summarize the AmeriCorps Provisions on this issue. They are intended only as guidance and are not a substitute for the Provisions or other federal rules and regulations. For more information, please refer to the [AmeriCorps Provisions](#).

**Budget Modification Procedure**

All changes to an approved AmeriCorps budget require approval by Serve Idaho as described below. The following procedures should be followed for all revisions to the approved budget.

**Programs should allow 3 weeks for action on budget revisions requiring prior written approval.** Program staff may be contacted to clarify information. Requests beyond the approval authority of Serve Idaho will be forwarded to the Senior Portfolio Manager at the AmeriCorps Regional Office for final approval. **Please allow up to 6-8 weeks for a response from AmeriCorps.**

America Learns does not allow programs to enter expenses that exceed the budgeted amount for each line item. If a program plans to request reimbursement for a line item in excess of what was originally

budgeted, they must submit a budget modification request in America Learns. Budget modification requests must be submitted at least 5 business days prior to submitting the monthly or quarterly periodic expense report (PER). America Learns functionality does not allow for programs to submit a PER while a budget modification is pending, or submit a budget modification while a PER is in process. Budget modification requests must be in compliance with all grant guidelines and restrictions. Further guidance is available in the AmeriCorps provisions. Contact Serve Idaho's Financial Specialist for clarification of guidelines.

### **Procedure**

1. Complete a budget modification request in America Learns.
2. In the America Learns Budget Modification Request notes section, explain why additional funds are needed in that line item (if funds are being added) or why there are excess funds in that line item (if funds are being removed)
3. Submit the Budget Modification Request to Serve Idaho in America Learns.
4. **Allow 5 business days for Serve Idaho approval.**
5. **Allow 3 weeks for AmeriCorps the Agency approval** (if approval is required).
6. America Learns will maintain a copy of the approved Budget Modification Request signed by Serve Idaho staff.
7. Adjust internal records as necessary.

### **Approval Authority:**

Authority for revisions to an AmeriCorps program budget is as follows:

1. Total of all budgetary changes in the original approved budget, *less than or equal to 10% of total prime budget*: **Serve Idaho Financial Specialist.**
2. Total of any and all budgetary changes in the original approved budget that push the cumulative budget changes for the year for the entire formula prime over 10%, revisions to purchase equipment over \$5,000, specific costs requiring prior approval before incurrence under the uniform administrative requirement, cost principles, and audit requirements for Federal awards at [2 § CFR PRTS 200.308](#) and [2205](#): **AmeriCorps Regional Senior Portfolio Manager.**

The following circumstances require prior written approval from AmeriCorps:

- Specific costs requiring approval under the OMB super circular,
- Purchases of equipment over \$5,000 unless in approved application and budget,
- Adding a line item in a category currently without a line item.

**Programs should not consider budget modification requests approved until they receive an approval notification in America Learns.**

### **Sub-granting Funds**

Programs must receive prior approval from Serve Idaho and AmeriCorps to sub-grant or subcontract program activities not previously approved in the application for funding. Programs must receive prior approval from both Serve Idaho and AmeriCorps to transfer the grant or to sub-grant to a different organization. For more information, please refer to the [AmeriCorps Provisions](#).

### **Equipment**

Programs may not purchase equipment costing more than \$5,000 with grant funds unless specified in the approved budget or application without prior approval from Serve Idaho and AmeriCorps. All purchases of equipment and supplies should be handled in accordance with OMB standards. For



more information, please refer to the AmeriCorps Provisions.

### **3. No Cost Extensions**

A no cost extension occurs when a grantee's budget end date is changed to an agreed upon later date without any increase to the grant budget (no additional funds are granted). Typically, no cost extensions are granted to allow a member to finish their term of service when they have had an extenuating circumstance that prevents them from completing their term of service within the originally allotted time frame. Examples include illness, surgery, hospitalization etc.

The grantee should complete the No Cost Extension Request form and submit the requested information for consideration to the Serve Idaho Financial Specialist at least 45 calendar days before the original budget period end date.

Programs may not enter into commitments with members, contractors, or other individuals or organizations that would cause costs to be incurred beyond the budget period end date prior to receiving Serve Idaho approval.

Submission of a request for an extension is not a guarantee that the request will be approved.

Once all requested documentation is submitted and received by Serve Idaho, it will be thoroughly reviewed. **Grantees should be in contact with Serve Idaho as soon as the potential need to request a no cost extension is identified, and no later than 45 days before the closeout of the grant.** No cost extension requests are not considered official requests and will not be reviewed until the no cost extension form has been submitted to the Serve Idaho office with signatures.

Serve Idaho has a budget period end date with AmeriCorps. If a grantee's requested new end date will take Serve Idaho beyond Serve Idaho's budget period end date with AmeriCorps, then the request must be approved by AmeriCorps before it is approved by Serve Idaho.

A request for a no cost extension after the grantee's budget period end date has passed will not be approved under any circumstances.

### **4. Fiscal Reports and Reimbursement Requests**

#### **Expense Reports (ER's)**

The ER's are due to Serve Idaho on a monthly or quarterly basis. This will be established at the beginning of the grant year. If a change needs to be made to the reporting period, contact Serve Idaho's Financial Specialist. The Financial Specialist will need to approve the change and make the adjustment to the ER reporting excel worksheet. The ER's will be due on or before the 15<sup>th</sup> of the month. Should the 15<sup>th</sup> fall on a weekend, the reports are due the Friday prior to the weekend. If the program cannot meet this deadline contact Serve Idaho's Financial Specialist.

Serve Idaho will issue a reimbursement payment based on timely monthly/quarterly expense reports submitted by programs. The monthly/quarterly payments will result in year-to-date payments being equal to year-to-date reported expenditures by program. Failure to report monthly/quarterly expenditures by the due date will result in a delay in issuing reimbursement payments. If you experience technical difficulties reporting, please contact the Financial Specialist.

**Be sure to only include incurred expenses and match that are captured in your accounting system for that reporting period. Also, make sure you have calculated Section 3. Administrative Costs correctly.**

### **Cost Reimbursement Grant Reimbursement Request**

These procedures detail the process for reimbursement of expenditures incurred by programs of Serve Idaho for AmeriCorps grants. Serve Idaho utilizes expense reports (ER) to verify the amounts and types of expenditures reported as allowable costs by programs. Information on expense reports must be supported by source documentation and in the organization's general ledger. Serve Idaho staff will review sub-grantee records during desk monitoring and site visits. Sub-grantees must maintain clear documentation of all expenditures and match donations to support information reported on financial statements.

### **Submitting the Expense Reports:**

1. Serve Idaho will upload approved grant budgets in America Learns annually.
2. The Program's Financial Director will complete an Expense Report (ER) in America Learns filling in the CNCS share and the Grantee Share for expenditures for the month or quarter. The Program's Financial Director should review the ER and, *only submit in America Learns if information on ER is accurate and complete.*
3. The Financial Director should prepare, sign and attach the Subgrantee Financial Status Report (FSR) in America Learns under General Ledger. *Requested amount must directly correspond to the current expenses shown in the completed ER.*
4. Serve Idaho will process the request, reconcile any discrepancies or questions and forward the request to Department of Labor (IDOL) fiscal staff for payment.
5. Payment will be issued via check or direct deposit. *(Allow 4 weeks from receipt of signed request by Serve Idaho).*

### **Considerations:**

- Programs may only request reimbursement for expenses incurred.
- Programs should report match and in-kind donations in the quarter or month they are received and/or applied to the grant.
- Serve Idaho may request additional supporting documentation for any reimbursement request prior to processing.
- Programs must meet the approved match each quarter or month unless otherwise waived by Serve Idaho.

### **Fixed Amount Grant Reimbursement Request**

For full-cost fixed amount grants, the program must ensure they do not request more funds from Serve Idaho than they are entitled to draw based on members enrolled. The program may request funds on a monthly or quarterly basis throughout the year. Reconciliation will occur in the final month to ensure the subgrantee does not draw funds in excess of member hours served. Funds can be requested on a monthly or quarterly basis which will be determined at the start of the grant period. Reimbursements will be based on the total number of hours served by the members during the time period for which the reimbursement is being submitted.

The reimbursement request is due on or before the 15<sup>th</sup> of the month and must include:

1. The America Learns Expense Report

2. Member Eligibility Certification Form(s) (for any month in which new member enrollments occur) (attached under the General Ledger section of America Learns)
3. Fixed Amount Subgrantee Financial Status Report (FSR) (attached under the General Ledger section of America Learns)

### **Federal Financial Reports (FFRs)**

FFRs are financial status reports used by AmeriCorps to monitor sub-grantee spending. FFRs are cumulative over the space of the prime grant, typically 3years. Programs must submit Federal Financial Reports (FFRs) to Serve Idaho in April and October

### **The FFR and Program Income**

The FFR includes data fields to report program income that programs earn in excess of income earned that is used to meet the program share of expenditures.

FFR Forms can be accessed on [Basecamp](#).

### **Other Federal Funds Reporting Requirement**

The Kennedy Serve America Act added a requirement for AmeriCorps program grantees to report the amounts and sources of federal funds, other than those provided by AmeriCorps, used to carry out their programs. This includes other federal funds expended by programs and operating sites. You may need to amend your site agreements to specify this required information collection.

This will be an annual reporting requirement for amounts expended over the prior 12 months and will be reported with the October FFR on the [Other Federal Funds Spreadsheet](#).

The other federal funds reporting requirements are effective with FFR due in October 2023, for the reporting period ending September 30, 2023.

## **6. Member Reporting – My AmeriCorps Portal**

Programs need to know what is required of program/sites in terms of member data collection in order to monitor that they have met their reporting requirements. The specific AmeriCorps rules as to when some of these forms must be completed are shown in the table below:

<b>MEMBER FORM</b>	<b>DEADLINE</b>
Member Information Profiles	Must be completed before enrollment can be created
Member Enrollment Forms	Within 8 calendar days of enrollment
Change of Term/Status Forms	Within 5 calendar days of change
Member Exit Form	Within 30 calendar days of exit
Member Time Logs	Complete and accurate on a monthly basis at minimum.

## **7. Sustainability**

### **General Overview**

Serve Idaho defines “sustainability” as a plan that, through an organization’s use of various resources, will provide for a stronger infrastructure, stronger programs, and community self-sufficiency in regard to supporting the needs of its constituents, its financial health, and its ability to be well managed and accountable.

### **Sustainability Policy**

Programs must also follow the Sustainability Policy. Each program is required to gradually decrease reliance on federal funds, while continuing to meet the minimum match requirements. More information on these topics may be found in the [National and Community Service Act of 1990](#).

### **Policy Guidelines**

AmeriCorps has published increasing match requirements for all AmeriCorps programs.

Under this policy, each program is required to gradually decrease its reliance on federal funds, yet still meet the Regulation Match requirements. By either cash or in-kind matches in any category, programs must reach the required match level each year.

Please note that AmeriCorps has created an alternative match requirement for grantees located in either a rural or a severely economically distressed area prior to submitting their grant application. For additional information on the alternative match contact Serve Idaho’s Financial Specialist.

### **Intent of the sustainability policy**

The intent of the policy on sustainability is to decrease program dependency on federal funds, to ensure services provided by AmeriCorps members will continue if federal funding discontinues, and to make more funding available to support new programs.

Serve Idaho will help programs in the area of sustainability by sponsoring additional training and technical assistance on collaborations and partnerships, leadership, and fundraising, as needed.

## **8. Record Retention**

All financial records, supporting documentation, statistical records, evaluation and performance data, member information, and personnel records including timecards must be retained for at least 3 years after the close of the AmeriCorps prime grant or until Serve Idaho provides written notification that grant files can be destroyed, whichever period is longer.

If any litigation, claim, negotiation, audit or other action involving the records has been started before the expiration of the 3-year period, the records must be retained until completion of the action and resolution of all issues which arise from it, or until the end of the regular 3-year period, whichever is later.

## **Program Monitoring and Evaluation**

### **1. Purpose of Monitoring**

As stewards of public funding, Serve Idaho must ensure that the programs and sites they fund are aware of their contractual requirements and are following all the rules and regulations governing AmeriCorps funds. To accomplish this, Serve Idaho’s Grants and Contracts Officer and Financial Specialist have created systems for monitoring program/sites that are fully implemented and available in writing.

## Components of a Monitoring Strategy

An adequate monitoring strategy features an array of oversight of program/sites, including:

- Document Review
- Policy Review
- Interviews (Members, Site Supervisors, Program Staff, etc.)
- Compliance Reviews
- Program Quality and Performance Reviews
- One-on-one technical assistance as needed

In addition, all programs with high-risk, determined by the Risk Assessment Tool, will receive additional visits from Serve Idaho.

This policy will help to ensure high quality AmeriCorps programs are implemented while maximizing staff time and meeting the recommendations of the Inspector General regarding program monitoring.

## 2. Program Risk Assessment

Program risk assessments are used to allow Serve Idaho to effectively monitor compliance and progress of AmeriCorps State programs in Idaho and to provide an adequate level of both on-site and off-site technical assistance based on the systematically assessed capacity of programs to administer the AmeriCorps Program.

### Procedure

Each Idaho AmeriCorps program will be analyzed and assigned a risk category (in both programmatic and fiscal areas) each winter. The monitoring strategy specifically addresses issues contributing to the assigned risk category for each program, which may include issues other than those specifically listed in the Risk Assessment Template found on [Basecamp](#). The overall monitoring strategy will allow for the most time-intensive monitoring of the highest risk projects, with less time-intensive monitoring strategies applied, as appropriate, to lower risk projects. Programs will be assessed separately for their programmatic and fiscal risk and may have a more rigorous monitoring/site visit schedule for one section if a higher risk deems increased monitoring is necessary.

Risk level will also be provided to the review panel during the grant application review process. **Those programs in their first year, which have not completed half a year or more, will automatically be scored as medium risk, unless other factors move them into a high-risk category. If they are considered high risk, Serve Idaho staff will provide written documentation to the Commission stating what factors put them in this category.**

## 3. Monitoring/Site Visits

A programmatic and/or fiscal site visit will be made to every program one time per grant cycle, possibly up to one time per year, or more often as appropriate. For brand new programs, an in-person site visit will occur in the Fall of the new grant year to go over processes and to make sure that internal controls are set up and working well for the new program. The purpose of these visits is to assess the program's compliance with federal regulations and to help the program improve systems to pass an OIG audit.

On-site programmatic monitoring will focus on interviewing and shadowing members and site supervisors and reviewing program policies & procedures in depth. The [monitoring templates on Basecamp](#) will be used to assess program compliance.

At least one month before the in-person site visits, Serve Idaho will send out the agenda and any other documentation needed for the site visit.

If there is a transition in Program Director staff during the program year, Serve Idaho will automatically conduct an in-person site visit that program year regardless of risk level.

**Desk-Based Monitoring**

While an on-site monitoring visit can provide a valuable, direct view of program operations, it is a resource-intensive form of monitoring. Desk-based monitoring is more sparing of scarce resources of staff time and money and, when properly used, can foretell the need for more intensive intervention later to resolve sub grantee problems. The Grants & Contracts Officer will have a rolling calendar throughout the year to be able to check member timesheets, criminal history checks, etc. There may be times when further documentation will be needed from the program. The Grants Officer will notify the program and give them **2 weeks** to supply the necessary documentation.

Serve Idaho will utilize America Learns and eGrants as an effective management and monitoring tool. For instance, through America Learns and eGrants, it is possible to:

- Review member timesheets,
- Review each program/site’s progress on member recruitment and retention,
- Track member progress toward completing service hours,
- Check timeliness of reporting, including member forms, progress reports, and financial reports,
- Conduct member enrollment queries,
- Review specific line items from Periodic Expense Report.

Monitoring can have many purposes, some of the most important of which are summarized in the table below:

<b>Learning</b>	Finding out about AmeriCorps program service activities and community partners
<b>Publicity</b>	Hearing success stories
<b>Compliance</b>	Assuring that all federal, state, local, contractual, and organization-specific regulations, policies, and provisions are being followed
<b>Monitoring Progress</b>	Comparing actual outputs and outcomes to the performance measures outlined in a program’s contract
<b>Technical Assistance</b>	To improve overall quality of the program

**Fiscal Compliance**

At least once every 3 years, an in-depth fiscal review will be completed by Serve Idaho’s Financial Specialist. The majority of this part of the site visit will be completed with the assistance of the program’s fiscal staff, but some questions will most likely be answered by program staff.

Programs should have copies of their Expense Reports (ER’s) and Federal Financial Reports (FFR’s)

available when the site visit review takes place. A copy of the program's original budget should also be available. In general, a program must have all required backup documentations for each AmeriCorps and Grantee share expenditure reported on their ER's and FFR's. The financial site visit will look at the following documentation:

- Match
- Receipts for Grant Expenditures
- Internal Controls Systems
- Accounting Systems
- Payroll System
- Single Audit (if applicable)

### **Programmatic Compliance**

At least once every 3 years, an in-depth programmatic review will be completed by Serve Idaho's Grants and Contracts Officer. The Program Director and staff (if appropriate) will need to be available.

Written documentation and/or proof of compliance are necessary in case of an audit and need to be provided during the site visit. Programs should have written policies and procedures and documentation needs to be readily accessible. Programs will be required to submit their policies and procedures to Serve Idaho every 3 years or when updated.

Serve Idaho's Grants Officer and/or Financial Specialist send programs a site visit letter following their in-person site visit or after a desk monitoring item. Once the program receives their site visit letter, they have 30 days to address compliance items listed in the letter (other than initiating needed criminal history checks, which need to be initiated immediately). Failure to address compliance items within this timeframe can result in a hold on reimbursement requests.

### **Review Outcome**

After the monitoring visit is complete, the Grants and Contracts Officer and Financial Specialist will provide written feedback related to the review. The monitoring review will be used to determine if additional site visits are necessary and may impact a program's renewal application and ability to access additional training.

### **High-Risk Programs**

If a program is considered high-risk, they will have more than one site visit. The agenda will be determined by the reason for the visit. For example, the agenda for a visit that is being held because of a change in program director will focus on expectations of programs, AmeriCorps regulations and relationship building. The agenda for a visit that is being conducted because of concerns regarding prohibited activities will focus on meeting with members, site supervisors, and program staff to assess whether prohibited activities were taking place and to ensure prohibited activities do not occur in the future. A site visit feedback letter will serve as written documentation of what occurred during the visit.

High-risk factors may include, but are not limited to:

- A change in program director or other key staff,
- Legitimate member complaints to Serve Idaho,
- Poor past performance by the program (based on progress reports and/or previous site visits),
- Concerns regarding prohibited activities,

- Compliance with reporting deadlines,
- Financial compliance issues.

### **Monitoring Checklist**

In general, it is expected that Commission staff will monitor subgrantees to examine the following:

#### **Member Documentation**

- AmeriCorps Application,
- Determination of Eligibility,
- Background Checks,
- Retention Statistics (end of term/exit, change of status/term, terms of release),
- Hours Worked and Timesheets,
- Training Received,
- Benefits (childcare, health care, etc.),
- Member Service Agreements,
- Position Descriptions,
- Performance Evaluations (at least mid-year and end of year for full-time members; end of term only for less than full-time members).

#### **Program Documentation**

- Grievance Procedures,
- Prohibited Activities,
- Staff Timesheets,
- Progress Toward Meeting Performance Measure Targets,
- Measurement Tools,
- Use of America Learns,
- National Service Identification (signage, uniforms, published materials),
- Subcontracts or Host Site Agreements (if applicable).

## **4. Subgrantee Monitoring Responsibilities**

Each subgrantee must have and implement a plan for oversight and monitoring to ensure that its service locations have agreed to comply and are complying with the current AmeriCorps State and National Grant Provisions and other relevant grant requirements. This plan should include policies and procedures on training, oversight and monitoring of program's service locations. This plan will be reviewed by Serve Idaho staff as part of the compliance monitoring process.

## **5. Grant Closeout**

Programs shall submit, within 90 calendar days after the date of completion of the award, all financial, performance, and other reports as required by the terms and conditions of the award. The Federal awarding agency may approve extensions when requested by the recipient.

Unless the Federal awarding agency authorizes an extension, a recipient shall liquidate all obligations incurred under the award no later than 60 calendar days after the funding period or the date of completion as specified in the terms and conditions of the award or in agency implementing instructions.



The federal awarding agency shall make prompt payments to a program for allowable reimbursable costs under the award being closed out.

The program shall promptly refund any balances of unobligated cash that Serve Idaho has advanced or paid and that are not authorized to be retained by the recipient for use in other projects. The Office of Management and Budget (OMB) governs unreturned amounts that become delinquent debts.

When authorized by the terms and conditions of the award, Serve Idaho shall make a settlement for any upward or downward adjustments to the Federal share of costs after closeout reports are received.

The program shall account for any real and personal property acquired with Federal funds or received from the Federal Government.

In the event a final audit has not been performed prior to the closeout of an award, Serve Idaho shall retain the right to recover an appropriate amount after fully considering the recommendations on disallowed costs resulting from the final audit.

### **Serve Idaho Closeout Requirements**

Serve Idaho will send a closeout letter to our Formula and Competitive programs at the end of the 3-year prime grant cycle. If the program does not re-apply for AmeriCorps funding, or the Commission chooses not to renew the program’s grant, the program will receive a closeout letter.

After the program receives the closeout letter, they will need to provide the following:

1. Final Progress Report,
2. Final FFR that is cumulative over the entire project period,
3. **Inventory of Equipment** (\$5,000 or over, unused supplies with an aggregate value greater than \$5,000 purchased with grant funds) –
4. **Inventory of residual supplies** –

[Inventory of equipment](#) and [inventory of residual supplies](#) forms can be accessed on Basecamp.

## **6. PROGRAM EVALUATION**

As articulated in the AmeriCorps regulations [45 CFR §§ 2522.700-740](#), all AmeriCorps State and National grantees that receive an average annual AmeriCorps **competitive** grant of \$500,000 or more must conduct an independent evaluation. An independent evaluation uses an external evaluator who has no formal or personal relationship with, or stake in the administration, management, or finances of the grantee or of the program to be evaluated.

All other AmeriCorps State and National competitive grantees who receive less than \$500,000 must conduct an internal evaluation. An internal evaluation is designed and conducted by qualified program staff or other stakeholders, such as board members, partners, or volunteer affiliates.

The \$500,000 threshold is based on the average annual funding the grantee receives from AmeriCorps (the CNCS share only, not the program’s total budget with matching funds) during the year prior to submitting your evaluation plan.

<b>If you are....</b>	<b>You will submit an....</b>
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AmeriCorps State Competitive program receiving an average annual AmeriCorps grant of \$500,000 or less	Internal or Independent Evaluation
AmeriCorps State Competitive program receiving an average annual AmeriCorps grant of \$500,000 or more	Independent Evaluation

Serve Idaho competitive programs are bound to the timeline and expectations of AmeriCorps as described in the AmeriCorps regulations [45 CFR §§ 2522.700-740](#). Further information can also be found in the evaluation resources folder on Basecamp.

#### Design Type

Serve Idaho Competitive Programs are bound to the Design Type requirements of AmeriCorps as described in the AmeriCorps regulations [45 CFR §§ 2522.700-740](#)

## **Additional Resources**

### **AmeriCorps Website:**

[www.americorps.gov](http://www.americorps.gov)

### **Serve Idaho Website:**

<https://serve.idaho.gov/>

### **AmeriCorps Search Statutes, Regulations, and FAQs**

[Statutes and Regulations | AmeriCorps](#)

### **Member Service Gear**

<https://gooddeed.org/amerikorps.aspx>

<https://americorps.nationalservicegear.org/store/catalog/americorps>

<http://www.companycasuals.com/careeruniforms/start.jsp>

### **AmeriCorps Education Award Information**

<https://americorps.gov/members-volunteers/segal-americorps-education-award>

### **AmeriCorps Logos and Communication Resources**

<https://americorps.gov/newsroom/communication-resources>

### **Manage Current Grants**

[State Subgrantees | AmeriCorps](#)

### **Acronyms**

<https://serve.mt.gov/AmeriCorps/program-directors/OCS-ACorps-Program-Directors-Guide-2021-2022-rev4.13.2021.pdf>