

Serve Wisconsin

Program Manual



Please note many policies and procedures are currently superseded by [CNCS COVID 19 FAQs](#). For more information please go to [CNCS's website](#) and [Serve Wisconsin's website](#)

Please notify Serve Wisconsin staff right away if you find any broken links or other issues. This manual is provided as a helpful resource to grantees; however, it does not relieve the grantees of their responsibility to operate within the AmeriCorps regulations, guidelines, grant Terms and Conditions, and Serve Wisconsin Guidance Memos. See section 1.5. Purpose of This Manual

Tip: To quickly find references to a certain topic, click "Ctrl" + "F" and type in keywords to search the entire handbook.



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Chapter 1 – Introduction to AmeriCorps and CNCS

1.1 Welcome to AmeriCorps and Serve Wisconsin

Congratulations on being funded as a Wisconsin AmeriCorps State Program! Funding for AmeriCorps programs is highly competitive, and your grant award is a testament to the value of your program.

The Wisconsin National and Community Service Board (WNCSB or “the Commission”) was established January 28, 1994, by then-Governor Tommy Thompson “to encourage community service and volunteer participation as a means of community and state problem-solving; to promote and support voluntary citizen involvement in government and private programs throughout the state; to develop a long-term, comprehensive vision and plan for action for community service initiatives in Wisconsin; and to serve as the state’s liaison to national and state organizations which support its mission.” The Board was later codified under [1993 Wisconsin Act 437](#).

WNCSB promotes, trains, and allocates resources to programs that enrich lives and communities through service and volunteerism. Serve Wisconsin achieves this by investing in sustainable service solutions, including AmeriCorps.

AmeriCorps, created by the signing of the [1993 National and Community Service Trust Act](#), provides opportunities for over 80,000 Americans each year to serve their community through AmeriCorps State and National, VISTA, and the National Civilian Community Corps (NCCC). Since 1994, when the first class of AmeriCorps members completed their term of service, **more than 1 million Americans have given over 1.4 billion hours of service through AmeriCorps.**

AmeriCorps members in Wisconsin serve in State and National projects, as well as in tribal communities. AmeriCorps State and National programs are open to U.S. Citizens, Nationals, or lawful permanent resident aliens age 17 and older. Members may serve in full- or part-time positions over a period of up to 12 months. Members support Wisconsin organizations that support the community through all six of the priority areas of the Corporation for National and Community Service (CNCS): disaster services, economic opportunity, education, environmental stewardship, healthy futures, and veterans and military families. Programs’ activities include tutoring and mentoring youth, fighting illiteracy, improving health services, building affordable housing, cleaning parks and streams, operating after school programming, building organizational capacity, and much more.

1.2 Summary of Changes

- Added additional trainings to 3.2 (B)
- Updated Notification/Permission Table
- Updated Prohibited Activities to include Census Activities and Election and Polling Activities
- Revamped AmeriCorps Program Activities in Disaster Preparedness and Response
- Revamped Compliance Monitoring

1.3 Introduction to AmeriCorps

AmeriCorps, which is funded by the [Corporation for National and Community Service \(CNCS\)](#), engages more than 80,000 individuals in intensive service each year through more than 15,000 nonprofits, schools, public agencies, and community and faith-based groups across the country. Members help communities tackle pressing problems while mobilizing millions of volunteers for the organizations they serve. They gain valuable professional, educational, and life benefits, and the experience has a lasting impact on the members and communities they serve.

AmeriCorps consists of three main programs: AmeriCorps State and National, whose members serve with national and local nonprofit and community groups; AmeriCorps VISTA, through which members serve full time fighting



poverty; and AmeriCorps National Civilian Community Corps (NCCC), a team-based residential program for young adults 18-24 who carry out projects in public safety, the environment, youth development, and disaster relief and preparedness. CNCS also supports Senior Corps, which taps the skills, talents, and experience of more than 330,000 Americans aged 55 and older to meet a wide range of community challenges through three programs: RSVP, the Foster Grandparent Program, and the Senior Companion Program.

The bipartisan Edward M. Kennedy Serve America Act focused AmeriCorps' efforts in six key areas: disaster services, economic opportunity, education, environmental stewardship, healthy futures, and veterans and military families. To strengthen accountability, AmeriCorps programs are required to demonstrate their impact using standard performance measures.

AmeriCorps members make our communities safer, stronger, healthier, and improve the lives of tens of millions of our most vulnerable citizens. AmeriCorps' impacts are proven and measurable.

For more information about the history of National Service and AmeriCorps, please visit the [Corporation's website](#).

1.4 Corporation for National and Community Service Strategic Plan

Established in 1993, the Corporation for National and Community Service (CNCS) is a federal agency that engages more than 5 million Americans in service through its core programs – Senior Corps and AmeriCorps. As the nation's largest grant maker for service and volunteering, CNCS plays a critical role in strengthening America's nonprofit sector and addressing our nation's challenges through service.

CNCS harnesses America's most powerful resource – the energy and talents of our citizens – to solve problems. From grade school through retirement, CNCS empowers Americans and fosters a lifetime of service.

CNCS Mission and Guiding Principles

The mission of CNCS is to improve lives, strengthen communities, and foster civic engagement through service and volunteering.

CNCS is guided by the following principles:

- Put the needs of local communities first.
- Strengthen the public-private partnerships that underpin our programs.
- Use our programs to build stronger, more efficient, and more sustainable community networks capable of mobilizing volunteers to address local needs, including disaster preparedness and response.
- Measure and continually improve our programs' benefits to service beneficiaries, participants, community organizations, and our national culture of service.
- Build collaborations wherever possible across our programs and with other federal programs.
- Help rural and economically distressed communities obtain access to public and private resources.
- Support diverse organizations, including faith-based and other community organizations, minority colleges, and disability organizations.
- Use service-learning principles to put volunteer and service activities into an appropriate context that stimulates life-long civic engagement.
- Support continued civic engagement, leadership, and public service careers for our programs' participants and community volunteers.
- Exhibit excellence in management and customer service.

CNCS envisions an organization that is:

- A catalytic, coordinating, and creative force in realizing this vision for service in America.



- A valuable resource to—and a partner with—national, state, and local organizations that encourage community service and address community needs.
- Entrepreneurial, innovative, effective, and efficient in utilizing its resources, influence, and activities.
- A good steward of taxpayer dollars that operates programs in a cost-effective manner.
- An agency with a demonstrated history of nonpartisanship.

Management and Organization

CNCS’s Board of Directors and Chief Executive Officer are appointed by the President and confirmed by the Senate. The Chief Executive Officer oversees the agency, which includes about 600 employees operating throughout the United States and its territories.

- [Executive Leadership](#)

The Board of Directors sets policies and direction for CNCS and is responsible for all actions taken by the Chief Executive Officer with respect to standards, policies, procedures, programs and initiatives as are necessary to carry out the mission of CNCS.

The AmeriCorps NCCC Advisory Board advises the director and staff on policy and programs; assists in developing a long-term strategy; facilitates the pooling of national, state, and local resources; reviews program progress and direction; and assists in evaluating the program.

1.5 Purpose of This Manual

As an AmeriCorps program funded through Serve Wisconsin, this manual provides information on effective program management that has been gathered through consultation with the Corporation for National and Community Service (CNCS), the Office of the Inspector General, or other CNCS representatives. This manual does not replace the regulations, grant Terms and Conditions, application instructions or Notice of Funding Opportunity (NOFO) for the applicable grant year, as provided by CNCS. Many of these documents are incorporated by reference into the annual grant agreement. This manual is intended to assist grantees by providing relevant Corporation materials and applicable state guidelines in a centralized location that is easily searched. It will be updated annually, kept in an electronic format, and will be maintained on the Serve Wisconsin website. Any additions or amendments to the materials contained within this manual on an annual (or as needed) basis will be communicated to current grantees. This manual is provided as a helpful resource to grantees; however, it does not relieve the grantees of their responsibility to operate within the regulations, guidelines, and Terms and Conditions mentioned above.

It is recommended that Program Directors seeking guidance first refer to the Terms and Conditions and then read any relevant information from this manual. Individuals with questions or concerns should consult the [National and Community Service Act of 1990](#) (“Act”) (42 U.S.C.A. 12501 et. seq.), [the regulations issued under the act \(45 CFR 2500.1 et. seq.\)](#), the [Edward M. Kennedy Serve America Act](#), the most recent [AmeriCorps Grant Terms and Conditions](#), the AmeriCorps Application Instructions, NOFO and/or relevant state law. (Detailed Corporation regulations, Terms and Conditions, guidelines, and statutes can be found at <http://www.nationalservice.gov/build-your-capacity/grants/managing-ameri-corps-grants>.) AmeriCorps programs and members are eligible to utilize the Commission’s appeals process as described within these documents.

If there is a conflict between the contents of this manual and the federal guidance referenced above, the federal Terms and Conditions, regulations, etc. are the controlling authority. Still, AmeriCorps Program Directors should familiarize themselves with the information contained within this manual and are responsible for using the manual and related documents to obtain information necessary for the day-to-day operation of their programs. AmeriCorps Programs (also referred to as “grantees”) are responsible for operating in accordance with the



AmeriCorps Terms and Conditions, applicable federal statutes, regulations and guidelines and any amendments thereto. In addition, grantees are expected to operate their program in accordance with the grant application, budget and supporting documentation approved by the Corporation. The grantees are also responsible for assuring that all project sites and grant-supported activities are in compliance with applicable federal requirements.

The grantee has full fiscal and programmatic responsibility for managing all aspects of the grant and grant-supported activities, subject to the oversight of Serve Wisconsin. The grantee is accountable to the Serve Wisconsin for its operation of their AmeriCorps Program and the use of Corporation grant funds. It must expend grant funds in a judicious and reasonable manner. Although grantees are encouraged to seek the advice and opinion of Serve Wisconsin on special problems that may arise, such advice does not diminish the grantee's responsibility for operating decisions.

All Wisconsin AmeriCorps State Programs (competitive, formula, education award, etc.) receive federal funds as grantees of the Commission. Therefore, the Commission must ensure that grantees operating under this award comply with assurances and certifications, Terms and Conditions, regulations and 2 CFR 200 circular incorporated into the application process or by reference with the final grant agreement. The Commission executes a grant agreement with each grantee on an annual basis. This agreement details the relationship between the Commission and the grantee/program as it relates to the AmeriCorps grant. Grantees are expected to adhere to the obligations described within the grant agreement, which comply with federal and state regulations at the time of issuance.

Any exceptions to policies detailed within this document must be approved in writing by the Commission. Copies of written exceptions must be maintained by the program with their grant agreement. Policy exceptions should be requested through the program's Serve Wisconsin Program Officer as far in advance as possible.

If you notice any broken links, outdated information, inconsistencies, or other errors, please contact a Serve Wisconsin Program Officer right away so that we are able to make the correction.



Chapter 2 – Wisconsin State Service Commission

2.1 Wisconsin National and Community Service Board (Serve Wisconsin)

The Wisconsin National and Community Service Board (WNCSB or Serve Wisconsin) was established January 28, 1994, by then-Governor Tommy Thompson “to encourage community service and volunteer participation as a means of community and state problem-solving; to promote and support voluntary citizen involvement in government and private programs throughout the state; to develop a long-term, comprehensive vision and plan for action for community service initiatives in Wisconsin; and to serve as the state’s liaison to national and state organizations which support its mission.” The Board was later codified under [1993 Wisconsin Act 437](#).

WNCSB promotes, trains, and allocates resources to programs that enrich lives and communities through service and volunteerism. Serve Wisconsin achieves this by investing in sustainable service solutions, including AmeriCorps.

[2019-2021 Wisconsin State Service Plan](#)

As stated in the [1990 Serve America Act](#) (Section 178(e)), each State Service Commission must prepare a national service plan for their state that covers a three-year period, developed through an open and public process that includes measurable goals and outcomes for the state’s national service programs and is updated annually. It must also ensure outreach to diverse community-based agencies that serve underrepresented populations; provide for effective coordination of funding applications submitted by the state; ensure outreach to, and coordination with, municipalities and county governments; and contain information that the State Commission considers to be appropriate.

2.2 State Commissions and CNCS

State Service Commissions, such as [Serve Wisconsin](#), are vital links in the chain that translates national service dollars and initiatives into local results. Forty-nine States, plus the District of Columbia, Guam, Puerto Rico, and the U.S. Virgin Islands are represented by a State Service Commission. (South Dakota is the one state without a state service commission) These governor-appointed commissions date back to the creation of the Corporation for National and Community Service with the passage of the National and Community Service Trust Act of 1993. State Service Commissions annually manage more than \$250 million in federal national service grants, along with more than \$100 million from local sources, to make citizen service a reality. Not only that, but they also serve as watchdogs to ensure that these funds are used effectively.

*Those serving on the commissions power the engines of national service. More than 1,110 private citizens serve as commissioners to drive the nation’s philanthropic movement at public agencies or nonprofit organizations. State commissioners act as visionaries for service for governors, setting priorities for service and volunteerism, catalysts and ambassadors for service, creators of sustainable infrastructure for service and volunteerism, and developers of resources for the state.

In addition to overseeing the annual grant competition that awards funding to AmeriCorps State and other community service programs, State Service Commissions determine social needs in their states, set policy and program priorities, provide training and assistance, support national days of service, and promote service and volunteering. These organizations initiate activities that strengthen the role of service and volunteering to meet critical community needs across the nation in areas including literacy, environmental stewardship, housing, social services, and disaster relief.

State Service Commissions provide the connection in a state-federal partnership that maximizes the power of citizens to solve problems and strengthen communities.



America's Service Commission (ASC)

The [America's Service Commissions](#) (ASC) is a nonpartisan, nonprofit organization representing and promoting state service commissions across the United States. ASC is a peer network of governor-appointed commissioners and staff of the State Commissions committed to working on national representation and advocacy of national service and volunteerism, and peer-to-peer support. Through this network, voluntary service, in all its forms, is strengthened and enhanced by mobilizing the expertise of these individuals to represent all streams of national and community service.



Chapter 3 – Program Training, Technical Assistance & Core Competencies

3.1 Program Technical Assistance and Training Overview

Serve Wisconsin utilizes a program development system that includes training, technical assistance and support to strengthen program operations and to ensure high quality programming targeted at addressing Wisconsin’s needs. This is coupled with a thorough monitoring system designed to identify opportunities for continuous improvement and to ensure compliance with federal and state requirements.

Program management and program accomplishments are major factors of consideration for continued grant funding. These factors will have a significant weight when considered by Serve Wisconsin and CNCS related to ongoing program funding. Commission staff reports to the Corporation related to program successes and challenges. As necessary, Serve Wisconsin will bring significant compliance issues to the attention of the organization’s Authorized Representative or other leadership. It should be noted that the Corporation and its contracted associates (auditors, monitors, etc.) will collect monitoring information from Serve Wisconsin to use in determining sites they will visit during their monitoring of Serve Wisconsin.

3.2 Technical Assistance & Training for Wisconsin AmeriCorps Programs

In order to offer program support and ensure compliance with regulations, Serve Wisconsin will provide training, technical assistance and support, coupled with a thorough monitoring process, designed to detect and correct compliance issues.

Serve Wisconsin staff is open to training and technical assistance suggestions from AmeriCorps program staff, including, but not limited to, quarterly progress reporting in OnCorps, annual program monitoring, and evaluations conducted following every Serve Wisconsin training event. Based on input provided, Serve Wisconsin will conduct trainings for AmeriCorps Program staff and other National Service Program staff (as allowable by CNCS) throughout the year as funding allows.

A. Technical Assistance

i. AmeriCorps State Program Handbook

Programs are encouraged to familiarize themselves with and reference the CNCS Terms and Conditions, regulations and guidance related to operation of the AmeriCorps programs. These governing documents are referenced in this handbook and incorporated by reference into your AmeriCorps Grant Agreement. NOTE: for the most up-to-date forms and resources please visit the Serve Wisconsin Basecamp page.

ii. Serve Wisconsin Email Distribution List

Serve Wisconsin staff strives to keep programs updated on important policy and program developments, provide reminders of important dates, and share other important information. In support of these goals, Serve Wisconsin communicates through regular emails. Important and often timely information about CNCS and Serve Wisconsin policy changes, information from CNCS, requests for program input, reminders and registration information for upcoming trainings, due dates for reports and forms, etc. is communicated through Serve Wisconsin’s email distribution list. It is critical that Program Directors review all information provided in important emails and share the information with other relevant individuals (members, site supervisors, financial personnel, etc.). Please keep Serve Wisconsin informed of any changes in contact information.



All updates that are relevant to the group will be posted to Basecamp. Ones that are of higher importance will also be emailed out to Program Directors using the servewisconsin@wisconsin.gov email address in addition to being posted to Basecamp.

iii. Monthly Calls

In order to recap some of the more recent communications coming from our office and highlight upcoming dates of importance, Serve Wisconsin staff hosts monthly update calls for AmeriCorps program staff. These calls are scheduled to occur the first Wednesday of every month at 1pm. To participate, please go to the Basecamp Calendar to find the call details.

iv. Serve Wisconsin Newsletter

The newsletter contains important and often timely information about Serve Wisconsin program happenings, special events, as well as reminders and registration information for upcoming trainings, due dates for reports and forms, etc.

v. Basecamp

Serve Wisconsin utilizes Basecamp as an online community for AmeriCorps program staff. Messages posted to Basecamp often contain important and timely information about CNCS and Serve Wisconsin policy changes, information from CNCS, requests for program input, reminders and registration information for upcoming trainings, due dates for reports and forms, etc. At any time, those with access to the Serve Wisconsin Basecamp team can view the current members of the group to ensure that all program staff they wish to be part of the community indeed has been granted access. Basecamp is also the home of a resource library that Serve Wisconsin maintains. Programs are encouraged to refer to the resources stored there, as many answers to questions are stored there.

vi. Staff

Serve Wisconsin Program Officers are available to offer technical assistance to programs.

a. Informal

Program Directors may contact staff at any time with questions or concerns regarding effective operation of the AmeriCorps program, however, Program Directors have the ultimate responsibility for knowledge of and adherence to AmeriCorps policies established by the federal government and by Serve Wisconsin.

b. Consultation/Technical Assistance Session

If a significant amount of time is required to respond to a program inquiry, Commission staff will request that Program Directors (or other staff) schedule an appointment.

vii. On-Site/Participatory

In some cases, on-site assistance is more beneficial, and programs are encouraged to request on-site assistance if needed. In addition, training and technical assistance opportunities are sometimes available at the national level through the Corporation.

viii. Program Director Association



Serve Wisconsin Program Directors are encouraged to use fellow Program Directors as resources. When concerns and challenges regarding the day-to-day operations of AmeriCorps programs arises, reaching out to other program directors who have gone through those same challenges can be extremely helpful. Often times peer support can be the best method for developing new strategies and gaining ideas for improving individual programs. The Serve Wisconsin Basecamp site is designed to be used in part as a forum for discussing general challenges and sharing ideas. Basecamp should not be used to share personal information and information regarding a member or program staff should be kept anonymous.

B. Training

Serve Wisconsin staff works to provide relevant, timely, and practical training to staff and members of AmeriCorps programs (in some cases, trainings are open to members of other national service programs, depending on federal regulations guiding the use of funds).

Staff and members are encouraged to take advantage of these opportunities to strengthen their program and make continuous improvements. In some cases, attendance is mandatory for Program Directors, so please mindful of this when reading through announcements. AmeriCorps program staff's attendance and participation in Serve Wisconsin sponsored trainings is often recorded and will be a factor for consideration in evaluation during program monitoring and future funding requests.

i. Program Director Training

A schedule of training events will be provided to the AmeriCorps Programs as far in advance as possible. For required Program Director trainings, each program must be represented by the Program Director or other appropriate representative (an AmeriCorps member is not an appropriate representative for these meetings).

a. New Program Director Orientation

Serve Wisconsin will provide an orientation/training for new Program Directors (those with less than two (2) years of program director experience) to provide them with training on program and grant management and give them an opportunity to share best practices. So long as funding allows, this will be provided on an annual basis. In the past these trainings have occurred at the end of summer.

b. Program Director Meetings

Serve Wisconsin will conduct yearly meeting(s) with AmeriCorps program staff. These meetings are intended to keep Program Directors informed of current issues and provide on-going technical assistance and training. It is expected that each Program Director will attend a meeting each year. If a conflict arises on occasion, the Program Director will assign another staff person (not a member) to attend the meeting and notify their Serve Wisconsin Program Officer of the substitution. Attendance and participation in the meetings will be a factor for consideration in evaluation during program monitoring and future funding requests. Failure to participate in Serve Wisconsin meetings can result in additional programmatic reporting to verify that the program has the information they need to effectively manage their AmeriCorps grant.

c. Grant Writing Workshop

Serve Wisconsin typically offers two Grant Writing Workshops each year – one in January/February, and one in August/September. These typically coincide with the release



of the Competitive and Formula RFPs. These workshops are open to current program staff, new staff, potential new programs, and anyone else interested in learning more about the AmeriCorps grantmaking process.

d. New Program Bootcamp

Serve Wisconsin, in partnership with On3Learn, offers a New Program Boot Camp in January of each year. This gives trainings on AmeriCorps and National Service 101, Member Management, Prohibited/Unallowable/Allowable activities, navigating CNCS Rules and Regulations, and other relevant topics. This Boot Camp is available to any program staff interested in attending. It is mandatory for new program directors and planning grant staff.

e. Wisconsin Evaluation Collaborative (WEC)

WEC provides 1:1 technical assistance on logic models, performance measures, data collection, and evaluation. If you would like to access TA from WEC, please consult your program officer.

f. Additional Trainings/Meetings

Typically Serve Wisconsin has offered additional trainings/meetings based on the information from Serve Wisconsin Staff monitoring and issuance of new or revised federal regulations or other guidance. Serve Wisconsin staff will keep programs updated on the status of future training.

ii. Regional National Service Trainings

Commissions in the Central region of the US, in conjunction with ASC provide regional trainings for all State Commission staff and AmeriCorps program staff. ASC intends for these conferences to build on and leverage previous investments to increase the capacity for national service resources to impact communities. The regional training offers workshops on topics including grants management, budget management, financial monitoring, performance measurement, national service criminal history checks and many other topics to support program and fiscal staff in the effective management of national service grants.

iii. Site Supervisor Training

When relevant, Serve Wisconsin welcomes the participation of site supervisors in trainings. Serve Wisconsin staff strives to ensure that training is useful to attendees and will make specific reference to trainings that are open to site supervisors. Programs are responsible for the training of their host site supervisors and other staff.

iv. Member Training & Service Events

The grantee agrees, within reasonable limits, to arrange for members to participate in AmeriCorps events and activities sponsored by Serve Wisconsin and the Corporation, such as relevant regional and statewide conferences, trainings and various service activities.

Member events sponsored by Serve Wisconsin are excellent opportunities for member development. Attendance should be encouraged and members should be permitted the time away from their site to attend Serve Wisconsin sponsored events.

C. Serve Wisconsin Sponsored Training and Event Reimbursement



Serve Wisconsin is committed to providing quality trainings to programs. Serve Wisconsin sponsored trainings and events that require the attendance of grantees will be communicated as soon as information is available. Serve Wisconsin requires that all grantees budget a minimum of \$2,000 each grant year to support travel for program staff to attend CNCS or ASC sponsored training.

D. Non-Attendance, Late Registrations, and Non-Registered

Serve Wisconsin reserves the right to request reimbursement from programs for any costs resulting from late registrations, non-attendance by registered participants or other actions by person’s associated with the program’s members or staff. *All costs relative to these requests for reimbursement must be paid from non-federal sources.*

E. Request Additional Assistance

Questions and requests for specific technical assistance should be addressed to your assigned Serve Wisconsin Program Officer.

3.3 Communication with Commission Staff

Periodically, Commission staff will contact program staff for information or input. Program Directors must make every effort to respond to these requests in a timely manner. If you will be out of the office for a significant period of time, we expect you to keep email and voice mail messages up-to-date so that we can be aware of absences. Particularly with Corporation deadlines, there may be occasion for us to contact Program Directors with an immediate need and information on absences is very helpful. Serve Wisconsin staff will also make every effort to inform programs of significant absences and to keep our phone and email messages updated to avoid delays in responding to program inquiries.

A. Alternate Contact

It is recommended that Program Directors designate another staff person at the grantee agency who will serve as the alternate contact for the AmeriCorps program when the Program Director is absent or unavailable. The alternate contact could serve as the Program Director’s designee on Program Director conference calls and should also have enough familiarity with the program to make time-sensitive decisions when the Program Director cannot be reached.

B. Program Director & Authorized Agency Staff

In general, communications related to day-to-day operation of the AmeriCorps program will go to the designated Program Director. Notices regarding grant awards/amendments, or serious concerns about programmatic or financial management will go to the authorized agency representative. Programs with multiple staff working on the AmeriCorps program must provide clearly designated staff roles and contact information for various operations. Serve Wisconsin staff will not be responsible for deciding who receives what information.

C. Cases You Are Expected to Notify or Ask Permission from Serve Wisconsin

Below is a table that includes examples of the scenarios in which you should notify or ask permission from your assigned Serve Wisconsin Program Officer.

Action	Notification	Permission
Late enrollments (outside deadlines of final enrollment form)	X	
Slot conversions		X
Term of service changes—only if after 90 days of member start date		X
Contract Period & Program Year Modifications or Extensions		X



Early exits - CPC employment		X
Significant retention problems	X	
Serious injury or death occurring to an AmeriCorps member during their service	X	
Staff or host site changes	X	
Reduction or Absence of Program Director (the absence for more than three months, or a 25% reduction in time devoted to the project)	X	
Changes to key personnel identified in the application or award document	X	
Substantial changes in the level of participant supervision		X
Changes in the scope, objectives or goals of the Program, whether or not they involve budgetary changes		X
Modifications to Program Performance Measure		X
Challenges to meeting performance measures	X	
Modifications to Program Budget		X
Developments or delays that have a significant impact on funded activities, any significant problems relating to the administrative or financial aspects of the grant, or any suspected misconduct or malfeasance related to the grant or grantee.	X	
Entering into additional sub awards or contracts for AmeriCorps activities funded by the award, but not identified or included in the approved application and grant budget		X
Program/Staff Development training approved by Serve Wisconsin, other than ASC Regional Training		X
Suspicion of waste, fraud, and/or abuse	X	



Chapter 4 – Program Design & Management

4.1 Program Identification (Terms and Conditions)

As a program that is part of the AmeriCorps National Service Network and Wisconsin’s AmeriCorps, the subgrantee agrees to identify its program as an AmeriCorps Program and participants as AmeriCorps members in the following ways (in addition to meeting the federal requirements regarding affiliation with the AmeriCorps national service network):

A. AmeriCorps Logo (Terms and Conditions – Specific III.B)

All subgrantee websites shall clearly state that they are an AmeriCorps subgrantee and shall prominently display the AmeriCorps logo. The subgrantee may not alter the AmeriCorps or Serve Wisconsin AmeriCorps logo, and should individualize the logo with their program name only in accordance with the Corporation for National and Community Service’s (CNCS) guidelines. Programs must obtain the written permission of CNCS, through Serve Wisconsin (also referred to as the *Commission*), before using the AmeriCorps name or logo on materials that will be sold. High quality downloads of the logos are available on the CNCS [website](#).

Donors to local programs may not use the AmeriCorps or Wisconsin AmeriCorps name or logo in advertising or other promotional materials without the express written permission of CNCS, obtained through Serve Wisconsin. Permission may be withheld if recognition of the donor is inconsistent with Serve Wisconsin’s and the Corporation’s policies.

B. Member Service Gear (AmeriCorps State Agreement Addendum #1)

It is a requirement that the program provide each of their AmeriCorps members with basic AmeriCorps service gear of the program’s choosing. It is required that members wear some type of AmeriCorps identification at all times during their service hours (during service hours and training/education activities). For example, in addition to member uniforms, an AmeriCorps pin, nametag with the logo or AmeriCorps patch or lanyard would be acceptable forms of identification.

Programs may design and provide program-specific member gear and include this in the program’s budget. An item with the AmeriCorps logo is a required budgeted expense. Subgrantees may add the AmeriCorps logo to their own local program uniform items using federal funds. Except for safety equipment, subgrantees may only charge the cost of member service gear to the federal share if it includes the AmeriCorps logo. All safety gear may be charged to the federal share, regardless of whether it includes the AmeriCorps logo. All other service gear without the AmeriCorps logo must be purchased with non-CNCS funds.

The official National Service Gear provider is [Industries for the Blind and Visually Impaired](#). Other providers used by subgrantees include, but are not limited to, [Bella’s Custom Design](#), and [Good Deed](#). Serve Wisconsin provides information for service gear providers, but does not recommend one provider over another.

C. Service Site Signage

AmeriCorps service sites are required to be clearly identified as AmeriCorps service sites with the appropriate AmeriCorps signs, including the AmeriCorps logo (at a minimum).

D. Media Inquiries

Program representatives should provide information only on their local AmeriCorps program. Media inquiries pertaining to AmeriCorps programs, Serve Wisconsin, the Corporation for National and Community Service, statewide initiative areas, statewide performance measures or other statewide



statistics/information, etc. should be directed to Serve Wisconsin Executive Director Jeanne Duffy at (608) 261-6716.

During media responses, the programs should use the following language regarding the Commission and its role/relationship to the state's AmeriCorps programs: "Serve Wisconsin is the state agency responsible for awarding program funding, and providing technical assistance, training, support and oversight of Wisconsin's AmeriCorps programs. Additional information on the Commission or Serve Wisconsin's AmeriCorps programs can be found at <http://servewisconsin.wi.gov/>."

Programs are encouraged to share local media coverage of their AmeriCorps programs, members and/or program directors with the Commission via email to their program officer or to the Community Engagement Specialist.

E. Member Public Outreach Activities

In all official program communications, including press or promotional marketing, AmeriCorps members should be identified as such. It would be appropriate to mention both the program and the fact that the member is supported through AmeriCorps – for example, Jean Smith, AmeriCorps member with ABCD Wisconsin AmeriCorps Program.

4.1 Site Management (Terms and Conditions)

AmeriCorps programs that utilize host sites for placement of AmeriCorps members should ensure that they are effectively managing those partnerships through signed written agreements that support overall program goals and quality member experiences. Serve Wisconsin AmeriCorps programs are expected to monitor sites for compliance and provide technical assistance and support to continuously improve host site management and placements.

A. Written Site Agreement

All programs should have a written site agreement in which both parties attest to their roles and responsibilities in the partnership. At a minimum, the agreement should cover the responsibilities of the site supervisor related to member oversight, evaluation and training, the member activities that are prohibited, the disciplinary procedures and the role of the supervisor in member discipline and termination, and financial and performance obligations on the part of the site (including when and under what circumstances these obligations would terminate or be reduced). These agreements should be reviewed and reissued on at least an annual basis and revised as needed. Depending on the scope and nature of the project, additional items may be covered in the written site agreement. Sample site agreements can be found on Basecamp. Host site agreements are reviewed by Serve Wisconsin during the program's document review monitoring. Programs may submit a copy of their written site agreement to the Commission for review if changes are made.

B. Site Selection ([45 CFR 2522.450](#) and [45 CFR 2522.475](#))

Wisconsin AmeriCorps programs are encouraged to utilize a written site selection process for continuous improvement and to maximize the mutually beneficial relationship between the organization and its sites. Programs must ensure that the site selection plan incorporates the criteria required by regulations (quality, innovation, sustainability, quality of leadership, past performance and community involvement). In addition, programs are required to ensure that the process also addresses the special considerations (program models, program activities and programs supporting distressed communities). This plan is described within the AmeriCorps grant application.

C. Host Site Monitoring



AmeriCorps programs must have and implement a plan for oversight and monitoring to ensure that each subrecipient and/or service site has agreed to comply, and is complying, with award requirements.

4.3 Performance Measures & Progress Reports ([45 CFR 2522.530-45 CFR 2522.650](#))

Performance measures (PMs) and progress reports are used to report AmeriCorps achievements during the program year. During the grant application and contract approval process, the program develops and the Commission and CNCS approve national performance measures and/or program-identified performance measures to be reported to CNCS. During first quarter progress reports, performance measures, including a description of the measurement tools you intend to use, must be entered into OnCorps.

Quarterly progress reports are due in OnCorps on January 20 (covering agreement start date through 12/31), April 20 (covering 1/1 through 3/31) and October 15 (covering 4/1 through 9/30) of each program year. At your program officer's discretion, you may be required to submit two separate reports for the 4/1 through 9/30 reporting period. Your program officer will inform you if two separate reports will be required. Reports should be completed for the dates mentioned, regardless of whether the program year ended prior to 9/30 or is not yet completed. In addition, programs that receive an extension past September 30 in Quarter 4 must complete a final progress report by January 20 of the following year.

Deadlines are detailed in Agreement Addendum #1, the Important Due Dates document and the Basecamp calendar. Failure to submit the information by the deadline can result in punitive action, such as suspension of grant payments. In addition, program progress reporting and timeliness are factors for consideration in grant review. Quarterly progress reporting requirements and instructions can be found in the [Program Progress Report – Quarterly document](#).

A. OnCorps Grantee Progress Report (GPR)

In order to submit the GPR to Serve WI, you will need to complete **all** six sections, which are as follows: General Info, Performance Data, MSY Report, Performance Indicator, Performance Measures, and Narratives. We recommend that before you enter data into OnCorps, that you first write narrative outside of the system, because the report will timeout after a short period of inactivity.

The OnCorps GPR can be found under Reporting → Submit Program Reports → OnCorps GPR. Step-by-step instructions and more details on the reporting requirements can be found [Program Progress Report – Quarterly document](#).

Complete GPR instructions can be found in BaseCamp in [Docs & Files → Program Resources → OnCorps](#).

B. Volunteer Mobilization Report

Programs are required to report quarterly the number of episodic and ongoing volunteers recruited/supported directly by AmeriCorps members along with the number of hours those volunteers served in the Volunteer Mobilization Report. For more information regarding the reporting requirements and instructions guiding the reporting can be found in the [Program Progress Reports – Quarterly document](#) in BaseCamp in [Docs & Files → Program Resources → OnCorps](#).

C. Modifications to Approved Performance Measures

If, during the program year, a program would like to request a performance measure modification, it must submit to the Commission a written request that includes:

1. Why you are not on track to meet performance requirements
2. How you have been tracking the performance measure



3. Evidence of the corrective actions you have taken
4. Any new proposed performance measures, targets, and/or instruments
5. Your plan to ensure that you meet any new measures

PM modification requests must be emailed to Serve Wisconsin within 30 days of determining that you are not on track to meeting your performance measures. No performance measure modification request will be accepted after the end of the second quarter (April 1st). A request letter (email or otherwise) must be received by Serve Wisconsin before formal consideration will be given to a modification request.

In quarterly progress reporting and at other times as needed and described in the Commission's risk-based monitoring policy, Commission staff will review the performance measure progress reports and may request reporting documents or other supporting materials to determine whether programs are on track to meet their measures. If it is determined that the program has not made appropriate progress, Serve Wisconsin expects that the program will develop a corrective action plan. Similarly, programs that identify challenges to meeting their performance measures at any time during the year should immediately notify their program officer.

Please refer to the following attachments to your AmeriCorps grant agreement for more information: *AmeriCorps Program Modification Guidelines*; *Sample Performance Measure Modification Letter*. These documents can be found in the Program Resources – Modifications folder on Basecamp.

4.4 Evaluation ([45 CFR 2522.500-540](#) and [45 CFR 2522.700-810](#); Annual NOFO/RFP)

Programs must fully cooperate with any CNCS and Serve Wisconsin evaluation efforts. Serve Wisconsin Program Officers will communicate with programs on evaluation status. Please contact your program officer if you have any questions regarding your requirements. In addition, CNCS [Evaluation Resources](#) are available on the Knowledge Network.

A. Requirements for Competitive Funded Programs

i. \$500,000 or more in AmeriCorps Funding

All programs receiving average annual CNCS program grant of \$500,000 or more must arrange for an external evaluation and submit the evaluation results with their application for re-compete funding.

ii. Less than \$500,000 in AmeriCorps Funding

Programs receiving average annual CNCS grant less than \$500,000 in AmeriCorps funds are required to conduct an internal or external evaluation. The evaluation must cover a minimum of one year, but may cover longer periods.

B. Timing of Evaluation Requirements (RFP)

Evaluation plan requirements for applicants that are not competing for the first time includes the following:

- If the applicant has received competitive funding for the same project (see definition below) for at least three years, it will be required to submit an evaluation plan.
- If the applicant has received at least six years of competitive funding for the same project, the applicant will be required to submit an evaluation report as well as an evaluation plan for the upcoming 3-year grant. If the applicant does not satisfy the definition of re-competing, it will not be required to submit an evaluation plan or completed evaluation report.



Two projects will be considered the same if they: address the same issue areas, address the same priorities, address the same objectives, serve the same target communities and population, and utilize the same sites.

CNCS will consider a project to be new if there is a meaningful difference between it and previous projects in comparison of the following characteristics, among others: the objectives and priorities of the projects; the nature of the services provided; the program staff, participants, and volunteers involved; the geographic locations in which the services are provided; the populations served; and the proposed community partnerships. (2522.340).

4.5 AmeriCorps Program Activities in Disaster Preparedness and Response

Serve Wisconsin is dedicated to assisting with statewide preparedness for, response to, and recovery from disasters. The Commission will provide disaster assistance utilizing the network of national service resources in Wisconsin, as needed and called up by the local, state and federal emergency management officials.

AmeriCorps programs are integral in assisting to prepare for and respond to disasters. Wisconsin AmeriCorps programs may be expected to participate in disaster preparedness, response and recovery activities as appropriate to their program design. Grantees must develop policies to allow for members to provide disaster services, both within Wisconsin and nationally. It is allowable for members to receive hours towards their term of service for participating in local, state, and national level disaster deployments and training opportunities, based on their program's approved disaster policy. All outside requests for AmeriCorps members to provide disaster services must be coordinated through the Commission and Program Directors must notify the Commission in advance of internally reassigning any members to participate in disaster activities. Depending on the severity of the disaster event, requests may come through county emergency operations centers, the state emergency operations center or through our federal partners, FEMA and/or the Corporation.

A. Local Disaster Response

AmeriCorps programs have the option to respond to a local disaster as it fits their program design upon notification to and approval from Serve Wisconsin, if the approved application included disaster activities, such as response and recovery, in its program design. All disaster deployments (outside of the approved program design) must be coordinated by the Commission. If you receive a request for disaster response or assistance directly from a local contact or County Emergency Management Official, please contact your Program Officer for additional instructions.

B. State Emergency Proclamation and/or State-Declared Assistance

AmeriCorps programs may be asked to serve in some capacity, as appropriate, in the event of a disaster that significantly impacts an area(s) of the state. During state-declared emergencies and disasters, the Commission will work closely with the State Emergency Operations Center (SEOC) to determine the necessity of deploying AmeriCorps members for disaster assistance. Requests received through the SEOC may allow AmeriCorps members to be reassigned to respond to a disaster. The Commission will work with programs to coordinate deployment of members to areas that are impacted by a disaster. Members should not report to disaster-impacted areas without approval and instructions from the Commission.

C. Wisconsin AmeriCorps Disaster Cadre

The Wisconsin AmeriCorps Disaster Cadre is a composite team of AmeriCorps programs that allow members to be deployed for disaster operations, both nationally and within Wisconsin. The Wisconsin AmeriCorps Disaster Cadre will have a trained group of members to provide services that will include, but not be limited to, disaster volunteer coordination, debris removal, disaster damage assessment, and disaster preparedness activities such as sandbagging. Wisconsin AmeriCorps programs may opt into the



Wisconsin Disaster Cadre by signing an agreement with Serve Wisconsin. The agreement is sent to all programs as an attachment to the Grant Agreement, but programs can join the Disaster Cadre at any time by contacting your Program Officer. The Wisconsin AmeriCorps Disaster Cadre will be deployable through the Disaster Response Cooperative Agreement between Serve Wisconsin and CNCS under the AmeriCorps-Disaster Response Team program.

D. Federal Disaster Recovery Cooperative Agreement (DRCA)

During times of federal declared disaster, the Commission will work with the Corporation and FEMA to ready Wisconsin AmeriCorps programs to respond to disaster under a mission assignment. Wisconsin AmeriCorps programs participating in the Wisconsin AmeriCorps Disaster Cadre that have member and program staff who have been adequately trained in disaster response and recovery may be deployed to national disaster relief operations. As with any disaster, programs must have prior approval from Serve Wisconsin Program Officers for members to deploy for a national disaster, whether in Wisconsin or another state.

E. Extension of Member Term for Disaster Purposes ([45 CFR 2522.220\(f\)](#))

If approved by the Corporation, a program may permit an AmeriCorps participant performing service directly related to disaster relief efforts to continue in a term of service for a period of up to 90 days beyond the period otherwise specified. A period of service performed under this regulation shall constitute a single term of service for the purposes of [45 CFR 2526.50\(a\)](#).

4.6 Members Serving as Reading Tutors/Requirements for Tutoring Programs ([45 CFR 2522.900-950](#))

Tutor, as defined in 45 CFR 2522.900, is 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.

A. Tutoring Member Requirements

Members serving as tutors are required to have at least a high school diploma or equivalent and have successfully completed pre- and in-service training for tutors.

B. Tutoring Program Requirements

Programs that provide tutoring activities must give members appropriate supervision by individuals with expertise in tutoring. In addition, tutoring programs are required to ensure all members receive high-quality, research-based training consistent with the instructional program of the local educational agency and State academic content standards. Documentation of supervisors and training provided must be maintained by the program and be made available for review during monitoring visits and/or audits.

4.7 AmeriCorps National Days of Service

National Days of Service are opportunities for AmeriCorps programs to engage their members in a service project and/or join with other programs to complete a service project. It is not mandatory to participate in a Day of Service. The National Days of Service include the following:

- [September 11th National Day of Service and Remembrance](#)
- [Make a Difference Day](#)



- [Veteran's Day](#)
- [Family Volunteer Day](#)
- [Martin Luther King Jr. Day of Service](#)
- [AmeriCorps Week](#)
- [National Volunteer Week](#)
- [Global Youth Service Day](#)



Chapter 5 – AmeriCorps Member Management

5.1 Eligibility, Selection, and Enrollment of Members ([45 CFR 2522.200-45 CFR 2522.210](#))

A. Eligibility (Terms and Conditions – Specific IX.B and [45 CFR 2522.200](#))

The subgrantee is responsible for following the Corporation’s eligibility requirements for members, namely that they must: (1) Be at least 17 years of age at the commencement of service OR be an out-of-school youth of at least 16 years of age participating in a youth corps-type program ([42 USC 12572A2](#)) OR an out-of-school youth of at least 16 years of age enrolled in a program for economically disadvantaged youth as defined in the Act ([42 USC 12572A9](#)); (2) Have a high school diploma or its equivalent, or be in the process of obtaining one; (3) Be a citizen, national, or lawful permanent resident alien of the United States; (4) Satisfy the National Service Criminal History Check eligibility criteria pursuant to [45 CFR 2540.202](#).

When the regulations refer to a birth certificate they refer to a legal document certified by and registered with a State’s office of vital statistics (often through local vital statistic branches). Although the official document that states the child’s name, place of birth, parents’ names, and so forth is often filled in at the hospital, it should not be confused with documents distributed by some hospitals that have no legal significance.

Please see Section B. Member Eligibility Documentation (Terms and Conditions - Specific IX.B and Regulations 45 CFR 2522.200) for information regarding the procedure to determine a potential member’s eligibility.

B. Term Limits & Education Award Eligibility ([45 CFR 2522.235](#))

Individuals may serve multiple terms of AmeriCorps service, but each branch of AmeriCorps does have term limits. Members may serve up to four terms in AmeriCorps State & National. However, they may only earn up to the value of two full-time education awards. Members who have already earned the maximum education award value may still enroll in subsequent terms of service, but they will receive no end-of-service benefit. Programs should consult with members on how many previous AmeriCorps State & National terms they have served to ensure they do not exceed the limits for this branch of AmeriCorps. Programs and members will see the aggregate value of an individual member’s education awards earned to date in the eGrants/MyAmeriCorps Portal (Portal). See Section H. Segal AmeriCorps Education Award for information regarding education awards.

C. Minimum Qualifications

The program is also responsible for establishing the minimum qualifications for membership in its specific program, selecting members that meet those qualifications, and assigning members to projects that are appropriate to their skill level. The grantee must select members in a fair, nonpartisan, nonpolitical and nondiscriminatory manner, without regard to the applicant’s need for reasonable accommodation of a disability or child care, without displacing paid employees or community volunteers, and in accordance with its approved application. The grantee is encouraged to select members who possess a commitment to the goals of AmeriCorps. See Terms and Conditions - General III.L for non-discrimination guidance, in addition to [45 CFR 2522.100](#), and [2540.210](#).

D. Members without a High School Diploma or GED

To participate in AmeriCorps, an individual must meet certain education requirements. If a member does not have a high school diploma or its equivalent at the time of enrollment, the program must ensure that



the person did not drop out of school in order to enroll in the program and they must have the member's written agreement to obtain a high school diploma or its equivalent before using the education award. If the member has been determined to be incapable of obtaining a high school diploma or its equivalent, the subgrantee must request a waiver from the Corporation to the diploma/GED requirement. The program must provide an independent evaluation demonstrating the member's inability to meet this requirement as part of its waiver request. The program must retain a copy of the approved waiver and the supporting independent evaluation.

Or, if the applicant does not fall into any of the above categories, he/she is considered eligible for AmeriCorps service if the program has verification of the member's enrollment at an institution of higher education on an ability to benefit basis and eligibility for funds under section 484 of the Higher Education Act of 1965 ([20 U.S.C. 1091](#)).

Programs must ensure the availability of support services to members to assist them in earning the equivalent of a high school diploma during their service as specified in [45 CFR 2522.100 \(k\)\(2\)](#).

E. Process to Enroll Members

Members can be enrolled two ways: via the MyAmeriCorps Application Process or via the MyAmeriCorps Invitation Process. Please refer to ASC Pre-Enrollment presentation which contains a step-by-step guide for enrolling a member.

F. Enrollment Documentation

All enrolled members must be assigned to a service location in eGrants/MyAmeriCorps Portal within eight days of members' starting a term of service. All service locations should be described by name, full address and ZIP+4 code. If a member is serving at multiple service locations, the program must select as the member's primary assignment the one where the member serves a majority of his or her hours. However, all service locations must be listed in the portal (Terms and Conditions).

Also see Section 5.8. Member Records (Terms and Conditions, 45 CFR 2522.820) for more information.

G. Enrollment Period

Programs must document in the eGrants/MyAmeriCorps Portal a member's enrollment and exit in a term of service. To see how this is done, please reference the [ASC Pre-Enrollment presentation](#).

To determine compliance with the 30-day exit requirements, use the Exit Approval Cycle Time Reports, which is available from the Reports menu in the eGrants Portal. The Reports page in the Portal is pictured below.



- Within all member contracts and handbooks.
- During member orientation.
- No less than 48 hours prior to member orientation, meetings, and trainings throughout their term of service.
- When the nature of conversation regarding a member's performance warrants the provision of reasonable accommodations as a solution to the performance issue.

Most reasonable accommodations are low to no cost. Prior to denying any accommodation request, program staff are required to consult with their program officer for assistance in determining whether providing the accommodation presents an undue hardship on the program and making a final determination as to whether an accommodation is reasonable or not.

Programs need to be proactive to ensure that everyone - including individuals with disabilities - have the opportunity to serve and to be active participants. Often managers need more information about accessible and inclusive recruiting or want disability-related information to assist supervisors of members or volunteers with disabilities. It is worth emphasizing that it is not uncommon for programs to have members with mental health impairments.

Programs that have members who are receiving Social Security Income (SSI) and receiving a living allowance through their AmeriCorps service may receive both. Living allowance shouldn't impact SSI eligibility as clarified in the Heart Act. If members are having trouble accessing both benefits, please email accommodations@cns.gov for clarification to local social security offices so that the Heart act is honored. Social Security Disability Insurance benefits will be affected by receiving a living allowance, however.

Programs with questions about providing reasonable accommodations can refer to:

- Job Accommodation Network (JAN) who will provide free technical assistance on matters related to disability inclusion and providing accommodations.
- Refer to CNCS resources including the 5 eCourses
- Contact accommodations@cns.gov directly with questions on what is a reasonable accommodation

5.2 National Service Criminal History Checks (Regulations [45 CFR 2510](#), [2522](#), [2540](#), [2551](#) and [2552](#))

Grantees must conduct and document a National Service Criminal History Check (NSCHC) on all employees, participants, and others who receive a salary, national service education award, living allowance, or stipend under Corporation grants. **All Wisconsin AmeriCorps program members and staff funded, partially or wholly, by federal funds or shown as match (in-kind or cash) on the AmeriCorps grant (also referred to as "covered positions") must receive a National Service Criminal History Check.** Because fixed amount grants are not required to report grant expenses, identifying staff in a covered position on fixed amount grants uses a different methodology. Instead, fixed amount grant programs should consider staff or national service participants who carry out the grant-funded activities or administer the grant to be in covered positions. If you are exempt from submitting budgets or financial reports, you should examine the activities in the funded grant application's narrative to determine the covered positions.

There are three components that comprise a NSCHC, and the minimum requirements for a compliant NSCHC will depend on the individual's level of access to vulnerable populations (as defined in the third paragraph of this section), and whether the individual is an AmeriCorps member or staff person. The four search requirements include: (1) **National Sex Offender Public Website (NSOPW) completed through Truescreen**, (2) **State**



Criminal History Registry, which includes a Wisconsin state check and a check of the applicant’s state of residence at the time of application if different than Wisconsin, completed through Truescreen (3) **FBI Fingerprint Check**, required if the individual will have recurring access to vulnerable populations, completed through Fieldprint.

Recurring access is defined as the ability on more than one occasion to approach, observe, or communicate with an individual through physical proximity or other means, including but not limited to electronic or telephonic communication. Vulnerable populations include children 17 years of age or younger, individuals age 60 and older, and/or individuals with disabilities.

The table below summarizes the requirements based on access to vulnerable populations. In most cases, programs determine their covered positions to have recurring access to vulnerable populations. Even if a program determines a position to not have recurring access to vulnerable populations, they may elect to conduct the checks as if the individual will have access to vulnerable populations to reduce risk if the individual were ever later to be determined to actually have that heightened level of access. The Corporation recommends that the grantee specifically address contact with vulnerable populations in each position description, service agreement, or similar document describing an individual’s service activities.

Check Requirements Based on Access to Vulnerable Populations

IF THE POSITION HAS NO RECURRING ACCESS –	IF THE POSITION DOES HAVE RECURRING ACCESS –
<ul style="list-style-type: none"> • National Sex Offender Public Website check through Truescreen <ul style="list-style-type: none"> ○ Applies to all applicants for covered positions ○ An individual may not serve/work prior to completion of this check • Statewide criminal history registry check through Truescreen <ul style="list-style-type: none"> ○ State of residence at time of application plus state where the individual will serve or work ○ An individual may not serve/work prior to completion of this check <p>OR instead of Statewide check</p> <ul style="list-style-type: none"> ○ FBI check - see details at right ○ Only can be used instead of Statewide check for individuals without recurring access 	<ul style="list-style-type: none"> • National Sex Offender Public Website check (see details to left) • Statewide criminal history registry check (see details to left) • FBI nationwide Criminal History Record Information check through Fieldprint <ul style="list-style-type: none"> ○ Obtaining FBI check does <u>not</u> substitute for the required statewide criminal history check(s) ○ An individual may not serve/work prior to completion of this check

For any individual in a covered position, it is required that all required criminal history check components be completed *before* service/work begins. How each component of the NSCHC is to be completed is detailed in the next few sections. It is best practice to complete these checks as soon as possible, well before the individual will be working/serving. This provides some extra time before an individual begins working/serving if any component of the NSCHC takes longer than expected.

The criminal history check procedure includes the following steps: (a) Verify the individual's identity by examining the individual's government-issued photo identification card, such as a driver's license, and document that you verified identity; (b) Obtain prior, written authorization to perform and review the check; (c) Document the individual's understanding that selection into the program is contingent upon the organization's review of the individual's criminal history, if any; (d) Provide a reasonable opportunity for the individual to review and challenge the factual accuracy of a result before action is taken to exclude the individual from the position; (e)



Provide safeguards to ensure the confidentiality of any information relating to the criminal history check, consistent with authorization provided by the applicant; and (f) maintain the results of the checks and document that you considered the results when selecting the member.

National Service Criminal History Checks determine eligibility. Eligibility is a controlling determination on allowable versus unallowable costs. Ineligible individuals serving or working for a program are likely to have associated costs (living allowance, education award, salary, etc.) questioned during audit, and corrective action required during Corporation oversight. Individuals are ineligible for a covered position (enrolled member or employee of the program) if they have committed a sex offense for which they have to be registered, or if they were convicted of murder, as defined and described in section 1111 of title 18, United States Code. An individual who refuses to consent to a State criminal registry check or FBI fingerprint check, or who makes a false statement in connection with a grantee's inquiry concerning the individual's criminal history, is not eligible to work in an AmeriCorps grant-funded position or to serve as an AmeriCorps member.

For more information from the Corporation regarding criminal history checks, including details about using Fieldprint and Truescreen services, go to: <http://www.nationalservice.gov/resources/criminal-history-check>

A. Checks for Re-Enrolling Members

Members who serve consecutive terms in a single program with a break of less than 120 days between terms do not require another criminal history check for the additional term. However, if the member will have recurring access to vulnerable populations during his/her consecutive term and did not receive all components for individuals with recurring access to vulnerable populations during the previous term, he/she is required to receive a heightened criminal history check prior to the consecutive term, regardless of the amount of time between terms. If an individual applies for a second (or later) term of service with a different program, a new check is required.

B. Consideration of Criminal History Findings and Member/Staff Acknowledgment

Each AmeriCorps program should develop a written policy about how criminal history checks will be handled at their agency, including timeframe in which checks will be conducted. Specifically, this should cover how the program will evaluate members and staff who have findings on their criminal history check, to determine whether they will serve/work within the program. Programs must obtain written authorization from each member/staff and document that the member/staff:

- has been informed of the national service criminal history check to be conducted,
- gives permission for the program to conduct the check,
- was told of the program policy on consideration of criminal history findings,
- is aware that member/staff participation/work is contingent upon criminal history review and that the member/staff has the opportunity to challenge the results. Challenges may be based on the assertion that there are errors on the report, but not on the program's decision about whether the individual's record disqualifies him/her from service/work in the program.

In addition, it should be clear that the criminal history check results are confidential.

C. National Service Criminal History Check Documentation

CNCS guidance states that the CNCS-contracted Truescreen service maintains documentation of search results for seven years and the CNCS-contracted Fieldprint service maintains records for three years. Programs must ensure that if the required records retention period for program records extends beyond the time periods Truescreen and Fieldprint retain records, that the actual, dated results of the criminal



history checks are retained in separate and secure program files until the records retention period ends; results should not be kept with other AmeriCorps staff/member records.

D. Costs Incurred Conducting Criminal History Checks

The cost of conducting criminal history checks is an allowable cost, reimbursable with grant funds. Member and employee applicants do not assume the cost of criminal history checks, unless the Corporation has given written permission to do so.

E. Financial Impact of Failure to Comply

More information about NSCHC compliance and enforcement can be found at <http://www.nationalservice.gov/resources/criminal-history-check>.

F. National Service Criminal History Check Training (Terms and Conditions, [NSCHC FAQs](#))

All programs **must** complete CNCS NSCHC training every year. The CNCS designated e-course provides a thorough overview of the requirements and can be found at: <https://www.nationalservice.gov/reqCHCtraining>. Each program must identify at minimum one relevant staff person to fulfill this requirement on behalf of the program. Successful completion of the eCourse will generate a dated certificate for the learner, with an expiration date one year following the date of completion. Maintain this certificate as documentation of completing the required annual training and consider them as grant records. Serve Wisconsin will ask for copies of the completed training certificate(s) at the time of monitoring.

Assign staff to retake the course annually prior to the expiration of the certificate. From the time that the first designated individual at an organization has successfully completed the eCourse, the organization must ensure that at least one individual on staff has an unexpired certification from the eCourse. For example, if an individual in an organization first completes the eCourse on June 1, 2020, either that individual or another appropriate individual within the organization must complete the eCourse again before June 1, 2021.

Though only one individual per grant is required to take this training, CNCS strongly recommends ensuring at least two individuals take the training in every required organization described to mitigate the risk of noncompliance in the event of unexpected absences or staff turnover. Organizations with multiple grants from CNCS must have one individual per grant take this training, unless one individual has responsibility for managing the NSCHC requirements across all grants.

Organizations subject to this requirement must update their policies and procedures to designate appropriate staff and ensure they complete the eCourse annually and maintain documentation of compliance.

5.3 Program Design – Member Positions, Term Length & Activities (Terms and Conditions)

A. Member Position Design and Final Enrollment Dates

At the beginning of each program year, programs must submit an *AmeriCorps Member Final Enrollment Date(s) Commitment Form*. The form will detail the number of members serving for each position type, final enrollment date and length of term. For example, programs may indicate they have 10 full-time Community Youth Development members serving 12-month terms and 5 full-time School-Based Tutoring members serving 10-month terms (the length of term and classification will vary by program). If a program is not on



track to meet their committed Final Enrollment Date for any position type, they must notify their Program Officer and request an extension.

Position types and term lengths should be the same or similar for members who are providing the same or similar service activities. Differences should be based on community need and not on individual member availability. In the example above, this would mean that the program could not enroll 4 School-Based Tutoring members in 10-month terms and 1 School-Based Tutoring member in a 9-month term unless the program could establish that the tutoring activities or the sites' needs differed among the members and these differences required different term lengths. Member period of service must be specified in the member contract. Programs will be expected to enroll the number of members in each of these categories and this will be monitored by Serve Wisconsin through site visits and/or desk reviews as part of the regular monitoring process.

According to section IV.E of the AmeriCorps Terms and Conditions, the grantee must ensure that each member has sufficient opportunity to complete the required number of hours to qualify for an education award. In planning for the member's term of service, the grantee must account for holidays and other time off, and must provide each member with sufficient opportunity to make up missed hours. Programs should plan for all members to finish their terms of service by the end of the original contract date, not 12 months from their start/enrollment dates. Exceptions will be made only for members who have been suspended (an official suspension in the My AmeriCorps Portal) during their term.

Final enrollment dates will be determined based on how the program fills out the *Final Enrollment Date(s) Commitment Form* after receiving their contract. It must be returned to your program officer by the due date will be listed on the form. In addition to establishing enrollment deadlines, the Commitment Form requires that position conversion requests be submitted on or before the final enrollment dates for each position type. For example, if a program's final enrollment date for full-time members is November 1, and the program wants to convert one unfilled full-time position to two half-time positions, the position change request should be submitted on or before November 1 of that same year. For more information on position conversions see section Changing Member Term of Service (Terms and Conditions IV.E.3 and CNCS Policy FAQ), and section Unfilled Member Positions/Position Transfer.

The following suggested enrollment deadlines have been created to encourage programs to consider reasonable terms of service (enrollment deadlines were created assuming a September 1 grant start date).

Term of Service	Enrollment Deadline	Final Enrollment Date Suggestions (assuming Sept. 1 grant start date)
Full Time	3 months from grant start date	December 1
Half Time	6 months from grant start date	March 1
Reduced Half Time	6 months from grant start date	March 1
Quarter Time	9 months from grant start date	June 1
Minimum Time	9 months from grant start date	N/A

B. Modification of Program Design – Position Conversion

While it is not recommended, it is sometimes necessary for programs to request to modify their member position configuration. The modifications should be based on community needs, not on individual member recruitment, site recruitment or other extraneous factors. Position configuration modifications are accomplished through a position conversion, and require prior approval from a Serve Wisconsin Program



Officer. See the *Member Position Conversions & Corrections in My AmeriCorps Portal* guidance memo for more information.

C. Calculating Conversions (Terms and Conditions - Specific VI.B and [CNCS Policy FAQ](#))

Full-Time Fixed-Amount and Professional Corps Fixed-Amount programs are able to convert their full-time positions to enable them to have less than full-time members serving in full-time capacity. All conversions, for all grantees, will be MSY and Trust neutral – the total number of MSYs and education award amounts in the grant may not increase as a result of the position conversion. Programs may also combine and convert less than full-time positions to full-time positions as long as such changes do not increase the total MSYs or total education award amounts awarded in the grant.

1 full-time member (1 MSY and a \$5,920 [amounts for 2017-2018] education award) may be converted into 2 half-time positions because the conversion is MSY-neutral (2 members x 0.5 = 1 MSY) and the total education award amount is Trust neutral (equal to or less than the original amount, 2 awards x \$2,960 = \$5,920). A chart below shows the MSY values by position type:

Term of Service	MSY
Full-time	1.000
Three-Quarter-Time	0.7000
Half-Time	0.500
Reduced-Half-Time	0.3810
Quarter-Time	0.2646
Minimum-Time	0.2116

One full-time member position may not be converted into 4 quarter-time positions because the conversion is not MSY or Trust neutral, since it increases the total MSY (4 members x 0.2646 = 1.0584 MSY) and the amount of the total education award (4 awards x \$1,538.36 = \$6,153.44). In this example, the maximum number of allowable quarter-time positions would be three (0.7938 MSY and \$4,615.08 education award value).

Some allowable conversions from full-time and half-time positions are:

1 FT position =		1HT =
1RHT+2QT	2QT+1MT	1QT+1MT
3QT	1QT+3MT	1RHT
2HT	4MT	1QT
1HT+1QT+1MT	2RHT+1MT	2MT

Note: these examples are conversions **from** one FT or HT position, not **to** one FT or HT position. That is, for example, one QT and one MT position cannot be converted to one HT position, but the converse can be done.

D. Changing Member Term of Service (Terms and Conditions - Specific VI.C and [CNCS Policy FAQ, Guidance Memo](#))

Within 90 days from a member’s start date in eGrants, programs may request to change a member’s term of service (filled AmeriCorps positions) to a smaller or larger slot. Please reference the linked Guidance Memo for more information on different possibilities of changing member term of service and slot conversion.



eGrants will not allow a program to change a member's term of service unless they have an unfilled position for the position the member is being changed to. For example, if a full-time member is being changed to a half-time position, the program must have an available half-time slot. Once the conversion is finalized, the slot in which the member was serving previously will be become available.

E. Unfilled Member Positions/Position Transfer

In some cases, Serve Wisconsin has the ability to move a program's unfilled member positions to another program(s) within the same prime grant; therefore, Serve Wisconsin expects that all programs will carefully manage their member positions at all times. If programs are not able to fill the awarded positions, they must either request a conversion of the positions prior to the enrollment deadlines or notify Serve Wisconsin when they become aware that they will not be able to fill all of their awarded member positions in any category (FT, HT, etc.). Every effort should be made to notify Serve Wisconsin as soon as possible, in order to allow adequate time for Serve Wisconsin to transfer the positions to another program and for that program to recruit and enroll a member(s). In the case that member positions are moved to another Formula program, associated cost/MSY resources may also be moved to the other grantee. Failure to fill all available member positions will be a factor for consideration of continued funding. CNCS expects 100% enrollment and 85% retention rates for AmeriCorps programs.

F. No-Cost Extensions (Grant Contract, Agreement Addendum #1)

No individual member contract may exceed 12 months. Regardless of slot type, all Wisconsin members must complete their terms of service within 12 months from the program start date. Serve Wisconsin Grant Agreements cover a 12-month period; therefore, a Grant Agreement extension would be required for any activities beyond that period. Without an extension, any member costs incurred after 12 months from the Serve Wisconsin Grant Agreement start date will not be reimbursed by Serve Wisconsin.

With approval from Serve Wisconsin, programs with one or more members who have been suspended may receive a no-cost extension for the length of the period of suspension(s) or to December 31 in the year of the current program year end date, whichever is the shorter period of time, to cover member support costs only, which could include the living allowance, member health care, FICA, etc. Fixed-Amount grantees may invoice for the hours served by eligible members during the no-cost extension period.

Only in the case of member suspension may a member's service be extended past the program's contract end date with Serve Wisconsin. In order to do so, the program must request a no-cost extension. This should come as a written request to your Program Officer with (1) the name(s) of the members you intended on having serve past the program contract end date because of member suspensions, (2) the length of the suspensions the members have served, and (3) the length of the no-cost extension you are requesting. Your Program Officer will respond once s/he have reviewed your request. To ensure that the member is covered by the contract in effect, programs must also be issuing a written and signed amendment to the member contract in order to extend the member's term of service.

No-cost extension requests should be made as soon as possible but no later than the end date of the grant contract.

5.4 Exiting Members and Refilling Positions (Terms and Conditions and 45 CFR 2522.230)

A. Member Exits – Education Award Status & Future Service (45 CFR 2522.230)

AmeriCorps members may be exited from the program because they have successfully completed their term, because they must terminate their service early due to a compelling personal circumstance, or



because they terminate their service early for cause. The exit status of a member determines whether he or she earns an education award and may affect his/her eligibility for future AmeriCorps service. For information related to the procedures around exiting members in the MyAmeriCorps Portal please see Section K. Member Exits – Paper Forms and My AmeriCorps Portal/eGrants.

Did the member serve through the contract end date?	Did the member meet the minimum hours requirement?	Did the member perform satisfactorily?	Exit Type	Education Award Eligibility	Future Service Eligibility (Subject to Term Limits)	eGrants Exit Label	OnCorps Exit Label
Y	Y	Y	Successful Completion	Eligible for Full Award	Eligible	Earned an Award – Completed	Successfully Completed
Y	N	Y	Cause	Not Eligible for Award	Eligible-Must Disclose Prior Release for Cause	Did not Earn an Award – Ended Service Early	Without Cause
N	N	Y	Compelling Personal Circumstances	Eligible for Partial Award*	Eligible	Earned an Award – Ended Service Early	Compelling Personal Circumstances
N	N	Y	Cause	Not Eligible for Award	Eligible-Must Disclose Prior Release for Cause	Did not Earn an Award – Ended Service Early	Without Cause
N	N	N	Cause	Not Eligible for Award	Not Eligible	Did not Earn an Award – Ended Service Early	Cause

*Eligible if the member served at least 15% of the minimum service hours.

B. Member Exit – Successful Completion

Members agree to serve for a certain period of time AND to complete a minimum number of hours during that time period. Members who fulfill these requirements, serving satisfactorily, are exited from the program with a full education award.

Programs may have members who complete assignments and reach the minimum hours requirement in advance of the originally agreed upon service end date (i.e. in less time than proscribed in the approved AmeriCorps Member Final Enrollment Date(s) Commitment Form submitted to the Serve Wisconsin at the beginning of the grant year). These members will earn a portion of the living allowance based on the portion of the service term that was successfully completed. For instance, a program that has a 12-month program design and has a member that completes the term of service (with program approval) in 11 months will provide the member 11/12 of the living allowance. The member is eligible for the full value of the education award (if he/she performed satisfactorily and met the goals of his/her term of service). Refer to Section Distribution, for more information on living allowances.



Members must receive a final evaluation certifying that they meet the requirements for a successful exit with a full award. Programs must change the member status to Exited in OnCorps and need to exit the member in the eGrants/MyAmeriCorps Portal within the 30-day deadline, and must maintain records documenting satisfactory completion of program requirements. The total hours completed entered into the Portal must match the total approved hours in OnCorps, always rounded down to a whole number. No prior approval is required in order to exit members who successfully complete their term.

C. Member End Date

Under no circumstances should members continue serving beyond their member contract period or the program's grant agreement period. This is for the protection of both the member and the program. Members serving beyond the program's 12-month member contract period will not be covered by a member contract (and are technically not members), and therefore raise many liability and safety issues for members, the public, and the program. Hours served outside of a fully executed member contract and/or grant agreement can be disallowed in case of audit, resulting in repayment of federal funds.

D. Early Termination for Compelling Personal Circumstances ([AmeriCorps State and National Policy FAQs](#))

Members may be released early from their term of service if the program determines that the member cannot complete his/her term due to compelling personal circumstances beyond the member's control. The grantee is responsible for determining and documenting compelling personal circumstances. The Corporation and its auditors may review these circumstances as part of their oversight and monitoring responsibilities.

Compelling personal circumstances exits with education award will be reviewed through program monitoring activities. See [45 CFR 2522.230\(a\)](#) for specific examples of what does and what does not constitute a compelling personal circumstance. Members released for compelling personal circumstances qualify for a pro-rated education award if they have served at least 15% of the service term, and the position is not available to be refilled.

One type of exit for compelling personal circumstances that requires more documentation to be sent to Serve Wisconsin is for member employment – see the related compelling personal circumstances due to employment Guidance Memo on Basecamp. If an AmeriCorps State program includes in its approved objectives the promotion of employment among its members (i.e., such an objective is described in the narrative of the AmeriCorps grant), the program director will be allowed to release a member participating in a 900-hour or 1700-hour term of service for a compelling circumstance (and thus grant the member a prorated award) if the program director determines that the member has been offered a “acceptable” employment opportunity. Similarly, if a member is a welfare recipient and is able to obtain a job that will get him or her off welfare, the program may deem his or her early departure from a program as a compelling personal circumstance. Members must have served at least 15% of their service term in order to be eligible for a pro-rated education award under these circumstances.

The program director must consult with its program officer before granting a member a prorated award for a compelling circumstance related to employment. In considering a request, the program officer will review the following to determine if doing so is in the member and program's best interest:

- The member must inform the program director about the job opportunity before making the decision to take the job. Specifically, the member must inform the program director about the new job opportunity at least one week prior to the start of the new job. This requirement must be included in the program's member contract, or in an addendum to the contract. This gives the



program director the chance to discuss with the member all of the options available. It may be a good idea to have the site supervisor participate in this discussion.

- A prorated award should not be granted to a member who disappears (i.e., stops showing up at his/her service site) and then reappears announcing that he/she has a new job. There needs to be a clear line of communication between the program director, the site supervisor, and the member.
- The new job must be an acceptable, quality job for the member. The new job must help the member advance his/her career.
- If there is a compelling financial situation that necessitates that the member takes a higher paying job, the program director may be able to release the member for a compelling circumstance whether or not the program has an approved objective regarding the promotion of employment among its members. For example, this may occur if a member is transitioning out of foster care. 45 CFR 2522.230 says that a compelling circumstance must be beyond the member's control. If the member is having problems making ends meet because of poor budgeting, the program director should consider whether the member may be able to stay in his/her AmeriCorps position and find a second job. Many members regardless of their financial situation find that they need to take on a second job.

As with any prorated award, the program director must document in the member's file the compelling circumstance. The following describes the documentation that is required:

1. The program director must have the member (and his/her legal guardian if applicable) sign the Serve WI CPC—Employment Form, which certifies that:
 - The member is leaving his/her term of service early to take a job that will advance his/her career.
 - The member understands that he/she will be granted a prorated AmeriCorps education award based on the number of service hours that he/she completed as of his/her exit date (if he/she has completed at least 15% of his/her hours).
 - The member understands that if his/her new job does not work out, he/she may not be able to return to the same AmeriCorps position that he/she vacated. The program director may consider the individual for another vacant position:
 - If the member is still eligible for an additional term of service;
 - If one is available; and
 - If the program director deems that the member will be able to successfully complete an additional term of service.
2. The program director must also keep written documentation in the member's file that verifies that the member was actually offered the job in question, such as a signed offer from employer.

The program director should document an explanation as to why this job was a compelling employment option for the member (may include the employment barriers the member has faced previously, whether the member was unemployed before beginning AmeriCorps service, whether the member is transitioning from welfare to work, the nature of the position offered, etc.).

If you have any questions about what is acceptable documentation for a compelling personal circumstances exit, please speak with your Serve Wisconsin Program Officer.

E. Early Termination for Cause



Members are released for cause if they do not successfully complete their term of service, for any reason that does not qualify as a compelling personal circumstance. Also, all members who complete less than 15% of their term of service must be released for cause in eGrants/MyAmeriCorps Portal. Members exited early for cause are not eligible for an education award.

It is possible for a member to be terminated from the program for cause and still receive a satisfactory performance evaluation. In these cases, the member would be eligible for subsequent AmeriCorps term(s) of service, as long as he/she performed satisfactorily during the term of service from which he/she was released for cause. Any individual released for cause is required to disclose the release when applying for any subsequent term of service. Failure to disclose past exits for cause will render an individual ineligible to receive the AmeriCorps education award, whether or not that individual successfully completes the subsequent term of service. Members released early from service for disciplinary action are not eligible for future terms of service.

Programs should have a disciplinary policy that outlines program rules about when/how members may be terminated for cause. All rules about termination must be included in the member contract.

F. Documentation of Early (Cause and Compelling Personal Circumstance) Member Exit

Full documentation of the reasons for any early exit must be maintained in the member's file. Programs must ensure that member timesheets are up to date and that an End-of-Term Evaluation is completed prior to terminating a member.

G. CNCS Member Exit Survey

When a program enters a member's start date, eGrants defaults to an expected completion date that is one year from the start date. This date cannot be changed. The member exit form in the Portal becomes available 60 days before the expected completion date, and at that time the member exit survey also becomes available to the member through a separate link in the Portal. This timing does not always work for programs with members serving less than full-time, who may complete their service well before the expected completion date. Whenever possible, these programs should make the exit survey available to members before they complete the exit process. The solution for these programs is to unlock the exit form in the Portal. Unlocking the exit form makes the exit survey link available to the member and sends the member a reminder to complete the survey. Programs do not have to exit their members at this time, but making the exit survey available to them will help increase response rates. See the [ASC Pre-Enrollment](#) presentation for step-by-step instructions on how to unlock the exit form in the Portal.

H. Confidentiality of Member Early Exit Rationale

Information in the member records, especially related to reasons why members must be exited early from their program, may be sensitive and confidential. Serve Wisconsin staff and contractors are aware of this requirement and will maintain confidentiality by not disclosing information except to another authorized person as allowable under federal and state law.

I. CNCS Refill Conditions

The following conditions, established by the Corporation, must be adhered to by all AmeriCorps programs regarding refilling of member positions vacated by members who exit early:

- Programs may replace any member who terminates service before completing 30% of his/her term provided that the member who terminates is not eligible for and does not receive a pro-rated education award.



- Only fully enrolled member service categories may be refilled. For example, you may only refill a full-time position if all of your other full-time positions are filled.
- Programs may not refill the same position more than once.

J. Suspension of Ability to Refill by CNCS

The Corporation will suspend refilling for all AmeriCorps programs nationwide if either:

- Total AmeriCorps enrollment reaches 97% of awarded positions.
- The number of refills reaches 5% of awarded positions.

Suspension of ability to refill typically occurs near the end of the Serve Wisconsin AmeriCorps program year.

K. Organizations Ineligible to Refill

Grantees that have special grant conditions under [45 CFR 2543.14](#) or [2541.120](#) are not eligible to refill positions. These are programs that have a history of poor performance, are financially unstable, have inadequate management systems, have not complied with previous grant awards and/or not otherwise responsible.

5.5 Member Leave or Suspension ([45 CFR 2522.230](#), [2540.220](#), and [2540.230](#))

A. Member Suspension Process (National Policy FAQs, AmeriCorps Terms and Conditions)

- Determine suspension to be the appropriate course of action
- Suspend the member in OnCorps and eGrants
- Document the suspension in the member's file
- Make changes to the member's benefits when appropriate
 - Living allowance
 - Suspended members are not eligible to receive any living allowance payments while in suspension. – PD Handbook
 - Members who are suspended for compelling personal circumstances and later return are eligible to receive the living allowance that they were not afforded during their suspension by serving the remaining term of their contract. They may not receive a lump sum payment.
 - Members who are suspended for minor disciplinary reasons may not receive a living allowance for the suspension period. – FAQs
 - Health Care
 - Members who are suspended for disciplinary reasons are not eligible to receive health and child care benefits.
 - The grantee must notify the Corporation's designated agents immediately in writing when a member's status changes, such that it would affect eligibility for childcare or health care. Examples of changes in status are converting a full-time member to less than full-time member, terminating or releasing members from service, and suspending members for cause for lengthy or indefinite time periods. – FAQ D.5



c. Child Care

- The grantee must notify the Corporation's designated agents in writing within five business days when a member's status changes, such that it would affect eligibility for childcare or health care. After five days, the recipient will be liable for any erroneous payments made to a childcare provider for an AmeriCorps member ineligible to receive AmeriCorps childcare benefits. Examples of changes in status are cases in which a member faces charges of a violent felony or controlled substance charge, and suspending members for cause for lengthy or indefinite time periods.
 - Members are not eligible for benefits while under suspension. However, if a member is put in a temporary suspended status and meets all of the below requirements, that member may be eligible to receive up to 12 consecutive weeks of continued benefits:
 1. The Member may not be suspended for cause and/or other disciplinary actions (an example of a qualifying suspension would be if a member was given a temporary suspension under the Family Medical Leave Act)
 2. The Member must intend to return to service;
 3. Member must certify he/she needs the continued benefit in order to be able to return to service.¹
 - Program directors should contact the AmeriCorps child care providers on child care related changes, and their health insurance provider about health insurance related changes.
- v. Upon the member's return, OnCorps will create all of the timesheets that were not created during the member's suspension. Members or site supervisors must enter a comment in the timesheet noting that the member was suspended during a portion or the entirety of the timesheet.

Under no circumstances may any member under suspension be allowed hours toward their term of service.

B. Family and Medical Leave

For the limited purposes of the Family and Medical Leave Act of 1993, AmeriCorps may be considered eligible employees of the program sponsor. Participants in Federal programs operated by the Corporation or by another Federal agency will be considered Federal employees for the purposes of the Family and Medical Leave Act if the participants have completed 12 months of service and the program sponsor is an employing agency as defined in 5 U.S.C 6381 et seq.; such participants therefore will be eligible for the same family and medical leave benefits afforded to such Federal employees.

C. Disciplinary

Programs must suspend members facing official charges for violent felonies, for selling or distributing controlled substances, or members convicted of possession of controlled substances. Members may be suspended for disciplinary reasons, for failing to uphold the service requirements and standards of conduct agreed upon in the member contract.

¹ 2017.02 ASN Childcare Eligibility Benefit Update



D. Grievance

Members who file a grievance challenging their release for cause must also be suspended.

E. Compelling Personal Circumstances

Members may also be suspended temporarily for compelling personal circumstances, such as an accident or serious illness. Programs should have a suspension policy in place and conditions that justify member suspensions should be outlined in member contracts. The same requirements pertain to suspension as they do for early member exit, for example, members should not be suspended to serve a summer internship, study abroad or take an extended vacation.

F. No Hours Served in a Pay Period

Situations in which a member serves zero hours during a pay period should be rare and the member should be suspended if there are periods in which no service is performed. One hour or more of service should be conducted each pay period. Otherwise, since the living allowance is to be distributed evenly over the service period, members who do not serve any hours in a pay period, but are not suspended either, should receive a living allowance payment; however, a member's agreement could also stipulate conditions under which the living allowance is paid and what the member should do if a period occurs in which no hours are served.

Some programs allow a member to serve *incidental* hours during periods where service is not taking place, such as during holiday breaks, school year breaks, etc. AmeriCorps service must provide a direct benefit to the community where it is performed, and programs must develop service opportunities that are appropriate to the skill levels of the participants that demonstrate a benefit to the community. There may be service that is not a direct benefit to the community, but are critical to the program's provision of service that benefits the community ([45 CFR 2520.20](#)). For example, attending opening or closing ceremonies could be acceptable incidental service.

Programs that choose to allow incidental service hours must include language in their AmeriCorps grant application that details the circumstances under which a member is able to count incidental hours towards their term of service. An example of this language is:

Our AmeriCorps members will [also] be provided the opportunity for occasional service outside the focus of this program in order to better understand and benefit their community and to participate in National Days of Service. These hours may be counted towards the member's term of service if they do not interfere with their normal service hours or conflict with prohibited activities, the service is approved by the member's supervisor [and/or] program director, and the supervisor of the service activity signs an agreement certifying the service and hours performed.

It is in the program's best interest to draft detailed policy regarding the total amount of incidental service that can be performed and how to obtain permission and document hours served during this time. Incidental service approvals by the program should be reasonable and equitable for all members (e.g. a program should refrain from approving incidental hours for a member who is behind in hours but not allow that same opportunity to someone who is on track to complete). All incidental service is still subject to the rules on prohibited activities.

When a member is providing incidental service that is not related to their program but counted towards their term of service, the member must wear their AmeriCorps service gear.



5.6 Standards of Conduct & Member Disciplinary Policy ([45 CFR 2540.310](#))

All AmeriCorps State programs must develop standards of conduct that are communicated to members within the member contract. These standards inform members of the expectations that programs have of them, such as that members will complete duties as assigned, submit reports on time, follow service site dress code, etc.

In order to deal with behavioral, attendance, or other disciplinary problems that may arise when members do not adhere to the program's standards of conduct, all programs are required to institute a written member disciplinary policy. Members must be advised of the procedure and potential disciplinary actions within their member contracts. Disciplinary policies must outline the steps that may be taken and the authority (site supervisor, program director) responsible to document and/or order such steps. Possible disciplinary actions may include verbal and written warnings, temporary suspensions, or termination.

Any disciplinary actions taken must be fully documented in the member file.

5.7 Member Benefits (NOFO/RFP, Terms and Conditions and [45 CFR 2522.240-45 CFR 2522.250](#))

All members should be informed of their eligibility for AmeriCorps benefits such as the living allowance, health care, student loan forbearance, and childcare. Information about member benefits should be included in the member contract. If any member waives a program benefit, the program must maintain proper documentation of the waiver in the member file.

A. Living Allowance (Terms and Conditions - Specific VIII.A, B, C and [45 CFR 2522.240](#))

Programs must provide members a living allowance that falls within the minimum and maximum amounts established each program year listed no later than at the time of grant award. Exceptions to the living allowance minimums and maximums exist for programs established prior to September 21, 1993 and for Professional Corps programs. Although Education Award and Full Time Fixed-Amount Grantees do not include member living allowance amounts in their approved budgets, they are still bound by the limits.

i. Distribution

Member living allowances are distributed to members evenly throughout their term based on the program design. Under no circumstances should a member's living allowance increase or decrease during their term of service. A member who starts their term of service in the middle of a pay period and serves hours in that pay period should be paid the full living allowance payment for that period. All member living allowance payments must be recorded in the program's general ledger.

Living allowances are not an hourly wage. Distributions for members will vary depending on the length of their service agreed upon in their member contract. For example, if full-time members are required to serve their terms in 10 months, the program must pay at least minimum living allowance (e.g. \$13,732) over ten months. If a program's 300-hour members are required to complete their terms in 3 months, the program must disburse the full living allowance (e.g. \$2,560) over three months. If a member does not complete his/her term of service within the amount of time designated, and the program extends the member's term, the member must complete his/her service hours with no additional living allowance payments. See table below for more situational examples.



Member Situation	Length of Service	Amount per Month	Total Living Allowance Provided
Member A starts and finishes on time	10 months	\$1,210	\$12,100
Member B starts on time and finishes one month early	9 months	\$1,210	\$10,890
Member C starts late and finishes late	10 months	\$1,210	\$12,100
Member D starts on time and finishes one month late	11 months	\$1,210	\$12,100
Member E starts one month late and finishes on time	9 months	\$1,210	\$10,890

Source: Financial and Grants Management Institute. (2012). Round Robin: AmeriCorps: Living Allowance Distributions, Handout 1.

ii. Payment Amounts

Member living allowances are to be consistent and based on the cost of living, not individual circumstances such as one program site having more money to pay members than another. With Serve Wisconsin approval, a program may pay an increased amount only on the basis of increased living expenses such as food, housing, or transportation and keep documentation of the reasons for variance in living allowance rates within member files.

iii. No Hours Served in a Pay Period

Please refer to section F. No Hours Served in a Pay Period above.

iv. Taxes

The living allowance is taxable as income both in Wisconsin and at the federal level. Programs are responsible for setting up their payroll systems to account for FICA.

B. Workers' Compensation (Terms and Conditions - Specific VIII.C.4)

Although under federal law members are not considered "employees" for purposes of the program, federal law appears to provide an exception for workers' compensation purposes. Wisconsin requires that all AmeriCorps members are covered by the agency workers' compensation plan for service-related injuries. Costs incurred providing workers' compensation for members is an allowable cost to the grant. Guidance from Wisconsin's Division of Worker's Compensation regarding Worker's Compensation for AmeriCorps members can be found on Basecamp under Program Resources, Financial Guidance.

i. Serious Member Injury or Death (Terms and Conditions - Specific V.J)

The program should notify their program officer in writing of any serious injury or death occurring to an AmeriCorps member during their service. Written notification is required and should be provided to your program officer within 48 hours of being informed of the injury or death. Please see Section Members that Leave without Completing Exit Process, for what procedures must be taken following such an event in the MyAmeriCorps Portal.

C. Unemployment Insurance

According to [Wisconsin State Statute 108.02\(15\)\(j\) 7](#), AmeriCorps members are not considered employees for the purposes of unemployment insurance coverage, with the exception of Professional Corps members. Therefore, members should not be listed on the agency/organization quarterly employee listing for the purposes of unemployment insurance coverage. If you do include the members on your unemployment report, you run the risk of losing an unemployment ruling and being forced to pay unemployment to a former member. Federal funds cannot be used for any member unemployment claims. For more



information, please see page 48 of the [Unemployment Insurance Handbook for Employers](#). See also: 8.4. Unemployment Insurance State Statutes.

D. AmeriCorps Health Care Policy (Terms and Conditions -Specific VIII.D)

Except for EAPs, Professional Corps, Partnership Challenge awards, or members covered under a collective bargaining agreement, AmeriCorps programs must provide, or make available, a health plan to 1700-hour full-time members who are not otherwise covered by a healthcare policy at the time the member begins his/her term of service. The program must also provide, or make available, healthcare insurance to members serving a 1700-hour full-time term who lose coverage during their term of service as a result of service or through no deliberate act of their own.

Programs are able to offer health insurance to less-than-full-time members serving in a full-time capacity. For purposes of this provision, a member is serving in a full-time capacity when his/her regular term of service will involve performing service on a normal full-time schedule for a period of six weeks or more. The plan must meet the AmeriCorps health care standards [detailed in the Terms and Conditions](#).

More information about Health Care Coverage Options can be found on the [Corporation's website](#).

i. Providers: The Corps Network

Serve Wisconsin maintains membership in The Corps Network, which allows any AmeriCorps State program funded through Serve Wisconsin to access member health coverage.

The broker for the Corps Network plan is Willis of Seattle. You may contact their benefits team at (800) 456-1415 or through their website at www.corpsnetwork.org.

ii. Health Insurance Market Place

AmeriCorps members may be eligible to obtain health care coverage through the Health Insurance Marketplaces. Members may also qualify for financial assistance to lower the costs of insurance. In some cases, insurance may be available with no monthly premium. Learn more at HealthCare.gov or read the [AmeriCorps State and National Member Health Care Q & A](#). Programs must develop a policy and process for implementation of their health care policy. The process, at a minimum, must require sufficient documentation (invoice, cancelled check, print off from the system showing they are enrolled, etc.) to demonstrate that the member has health coverage.

iii. Documentation of Waiver and Alternate Health Care Coverage

Within the member file for each full-time or eligible part-time member, the program shall maintain either a copy of the member's health care enrollment or a signed form certifying that the member has alternate coverage and is declining health care coverage.

Programs need to provide/make insurance available to eligible members and should keep documentation that they completed this required step. See Section G. Member Benefits, for more information regarding documentation.

iv. Use of an Alternate Health Care Provider

Programs may use alternate health care coverage vendors that are not listed above, but they must ensure that the coverage meets the AmeriCorps requirements detailed in the Terms and Conditions. If you are unsure whether an alternate plan meets AmeriCorps requirements, you should contact your program officer.

E. Childcare (Terms and Conditions and [45 CFR 2522.250](#))



The grantee must ensure that childcare assistance is made available to those full-time members who need such assistance in order to participate. Members are eligible if, at the time of acceptance into the program, the member is not currently receiving child care assistance from another source, including a parent or guardian, which would continue to be provided while the participant serves in the program. Please refer to [45 CFR 2522.250](#) for more information regarding eligibility to receive childcare. Programs whose members are income eligible and have qualified dependents may access childcare by working directly with the Corporation's national childcare provider, GAP Solutions Inc. (GAPSI), without prior Corporation approval. See <https://www.americorpschildcare.com/> for more information on how to access this assistance.

This benefit is provided by the Corporation, meaning it does not come out of the program's budget. If a member decides to utilize this benefit, the program must maintain all documentation in the member's file. All full-time members must sign a waiver of this benefit if they decide not to utilize it. A copy of this enrollment or waiver must be included in each full-time member's file.

CNCS will not cover childcare costs for members who served on a less than full-time basis for a sustained period of time, or who have ceased serving or who are serving in a Professional Corps program. Programs may provide childcare benefits to less-than-full-time members serving in a full-time capacity, but they are not required to do so.

While it is the member who has the direct benefit with GAPSI, as stipulated in the AmeriCorps Terms and Conditions, programs must notify in writing CNCS's designated agents within five business days after member's status changes in a manner that affects the member's eligibility for childcare. Examples of changes in status include: changes to a member's scheduled service so that he/she is no longer serving on a full-time basis, terminating or releasing a member from service, and suspending a member for cause for a lengthy or indefinite time period. GAPSI can be contacted directly at americorpschildcare@gapsi.com – the only information they require is the member's name and status change.

Programs should make this part of their regular member management plan. Using the Member Management Start-Up spreadsheet/checklist is a great way to ensure that it happens. Programs may use the [AmeriCorps Childcare Program Member Update form](#) to notify GAPSI and document that notification.

Lastly, GAPSI's contact information is:

ATTN: AmeriCorps Childcare Program
205 Van Buren St., Ste. 205

Herndon, VA 201790

Telephone: Toll-Free Number – (855) 886-0687

Email: AmeriCorpsChildCare@gapsi.com

Fax: 1-800-521-5415

F. Student Loan Deferment and Forbearance

National service members have options for how to deal with their student loan payments during service. Members request deferment and/or forbearance through the eGrants/My AmeriCorps Portal. To access and complete forms for forbearance or interest accrual payment, the member must be registered at <https://my.americorps.gov/mp/login.do>. Program directors should be cautious about promising these benefits to members because lending institutions have latitude in deciding whether they will grant these statuses depending on the type of loan, whether it has been consolidated, and a number of other factors. Loans already in forbearance cannot be switched to forbearance due to AmeriCorps service, and are not eligible for the interest accrual payment option. If there are questions, the member should work directly with his/her lending institution to determine whether he/she qualifies.



i. National Service Loan Forbearance

Under the National and Community Service Trust Act of 1993, borrowers serving in approved national service positions qualify for mandatory forbearance during their terms of service. This mandatory forbearance allows borrowers to delay payments temporarily. Mandatory forbearance for approved national service positions is available for the following educational loans: Federal Family Education Loans (Subsidized and Unsubsidized Stafford Loans, Supplemental Loans To Students (SLS), Consolidation Loans), William D. Ford Federal Direct Student Loans (Direct Subsidized and Unsubsidized Stafford/Ford Loans, and Direct Consolidation Loans), Federally Insured Student Loans (FISL), Health Education Assistance Loans (HEAL), Health Professions Student Loans (HPSL), Loans for Disadvantaged Students (LDS), Nursing Student Loans (NSL), and Primary Care Loans (PCL). During the time members are serving in a national service position, interest will continue to accrue on their loan(s). Upon successful completion of their national service term, CNCS will pay all or a portion of the interest that accrued during the time period served. If members leave for reasons other than compelling personal circumstances, they will be responsible for payment of interest and, if not paid, it may be capitalized depending on the type of loan.

ii. Economic Hardship Loan Deferment

Less commonly, national service members may be eligible for deferment on qualified student loans for reasons of economic hardship during the member’s term of service. For subsidized Stafford loans, interest does not accrue during deferment. For unsubsidized loans (including unsubsidized Stafford, Graduate PLUS, and Parent PLUS), the interest accrues and is capitalized at certain times, and the member is responsible for paying it. Many members meet their lenders’ requirements for deferments based on economic hardship, regardless of whether their loans are federally approved or not. However, interest may still accrue on loans in deferment, especially those that are unsubsidized. Additionally, some lenders may set limits on the number/length of time that loans may be placed in deferment. For private student loans, deferment eligibility is based on loan type.

G. Public Service Loan Forgiveness (PSLF) and Income-Based Repayment (IBR)

As an alternative to putting qualified student loans into forbearance or deferment, members serving in a full-time AmeriCorps position may be eligible to count the regular student loan payments made during their service toward the PSLF program. Members may elect to participate in the IBR plan in order to make their loan payments more affordable during service. Additionally, loan payments made using the Segal Education Award may count toward PSLF, even if the loan(s) are put into deferment or forbearance during service. The PSLF program allows an exception for AmeriCorps alums to make a lump sum payment using the AmeriCorps Segal Education Award and receive credit for up to 12 qualifying payments for PSLF. The number of payments for which a member will receive credit is determined by dividing the amount of the lump sum payment by the scheduled full monthly payment amount, (but members may not receive credit for more than 12 monthly payments toward the PSLF payment requirement). See <https://studentaid.ed.gov/sa/repay-loans/forgiveness-cancellation/public-service> for reference. The Consumer Financial Protection Bureau [website](#) may also have helpful information; on the home page enter “Public Service Loan Forgiveness” in the Search box.

H. Segal AmeriCorps Education Award

i. Award Basics and Amount



Members who successfully complete their terms of service are eligible for an education award; members who exit early for compelling personal circumstances may be eligible for a pro-rated education award if they complete at least 15% of their term of service. The amount of the Segal AmeriCorps Education Award is tied to the maximum amount of the U.S. Department of Education's Pell Grant. Since the maximum amount of Pell grants can change from year to year, so can the dollar amounts of education awards. Programs should check the NOFO/RFP that applied to that program year for corresponding education award amounts. Information about the Segal AmeriCorps Education Award can be found at <http://www.nationalservice.gov/programs/ameri-corps/segal-ameri-corps-education-award>.

ii. Education Award & Term Limits ([42 U.S.C. 12601-12604, 12606 PART 2526 – Eligibility for an Education Award](#))

Members may not receive more than an amount equal to the aggregate value of two full-time education awards. The “value” of an education award received is calculated based on its proportion to the full education award in the year the award was approved. An individual who, based upon the aggregate value of education awards previously received, is not eligible to receive the entire award amount offered for a term of service, will instead receive the portion of the education award that he or she is eligible to receive.

Individuals who have received a transferred education award must count the value of that education award when determining the education award amount they are eligible to earn through his/her own service (i.e. a member whose grandmother transferred to him/her a 0.5 value education award can only earn up to 1.5 education awards through his own service). See Transferability (42 U.S.C. 12601-12604, 12606 PART 2530 – Transfer of Education Awards) for more information.

Members may serve additional terms of service even if they have reached the limit of two full-time education awards. Members may serve up to four terms in AmeriCorps State & National, three terms in AmeriCorps VISTA (including VISTA Summer Associates), and two terms in AmeriCorps NCCC.

iii. Using the Education Award

The education award can be used to pay education costs at qualified institutions of higher education (i.e. tuition, fees, etc.), to pay for educational training (i.e. non-degree programs such as technical or vocational training), and to repay qualified student loans (generally federal student loans, NOT private loans). Members can make payments from their award in full or in part and can take up to seven years after their term of service has ended to use their award. Individuals who receive a transferred award have 10 years from the date in which the transferring individual earned the award to use it. Members will manage their education awards through the eGrants/MyAmeriCorps Portal.

Some institutions will match the education award if it is redeemed at their school, but claiming the education award up front may also affect a member's eligibility for other financial assistance. Members should research the best option for their individual circumstances.

iv. Taxes

AmeriCorps Segal Education Award payments (interest and award disbursements) are taxable as federal and Wisconsin state income in the year they are redeemed. Members should anticipate this when choosing when and how much of their education award to redeem.



- v. **Transferability ([42 U.S.C. 12601-12604, 12606 PART 2530 – Transfer of Education Awards](#))**
 Under certain limited circumstances, AmeriCorps State and National members who enrolled on or after October 1, 2009, may be able to transfer the education award they earn to another individual. A member may transfer an education award if the member was age 55 or older on the day he/she enrolled in the AmeriCorps State and National position; the award the individual is requesting to transfer has not expired; and the individual designated to receive the transferred award (a) is the transferring individual’s child, grandchild, or foster child; (b) is a citizen, national, or lawful permanent resident alien of the United States; and (c) has not already utilized the equivalent value of two full-time education awards. The person considering the transfer to another party should verify any additional requirements or stipulations by contacting the National Service Trust prior to attempting to make a transfer.

A transferred education award may be used for the same purposes as an earned education award. Members can initiate a transfer request through the eGrants/MyAmeriCorps Portal. Individuals receiving a transferred award have 10 years from the receipt of award to redeem it.

5.8 Member Records (Terms and Conditions, [45 CFR 2522.820](#))

All Serve Wisconsin AmeriCorps programs will use the reporting systems or forms for member management and recordkeeping as instructed by Serve Wisconsin and/or CNCS. Programs must complete and submit member-related records to the Serve Wisconsin or CNCS in accordance with reporting instructions, grant agreement, and Terms and Conditions. Programs must retain copies of these records, forms and messages for review in case of audit or site visit.

Programs must be able to document that every member is eligible to enroll in AmeriCorps and to receive in-service and post-service benefits. Completion of all programmatic forms (including evaluations, timesheets, exit forms, etc.) is a requirement for successful completion of a term of service. Members who do not provide their forms in a timely manner may be denied a Segal Education Award. It is recommended that programs inform members of this at the beginning of their term as a way to encourage timely submission of forms from members. In addition, if required forms are not included in the member records, CNCS or Serve Wisconsin could recapture member costs from the program.

Form	Format for Submission & Record Keeping	Date Due
Member Application Form Portal or program form	My AmeriCorps Portal (if using online application) or copy retained in member file Note: a resume <u>cannot</u> be used in lieu of an application	Prior to enrollment
Electronic National Service Enrollment Form	Member completes electronically in My AmeriCorps Portal	Prior to enrollment. The information from this form is used to initiate the automatic SSN and citizenship reviews.



Member Citizenship Verification Documentation (if required)	Manual verification submitted via fax or email to CNCS. Hard copy in member file	Within 30 days of request for verification from CNCS
Checklist for Getting Program Started	For your use and reference	
Checklist for Getting Members Started	For your use and reference	
Checklist for Setting Up Admin & Financial Systems	For your use and reference	
Member Documentation Checklist—Optional	Electronically in OnCorps under Manage Records → Members → Members	
Member Change of Status/Term	Changes approved by Serve Wisconsin and made in My AmeriCorps Portal and OnCorps	In Portal and OnCorps within 30 days of the member change of status
Member Service Locations	MyAmeriCorps Portal	Member service locations must be entered in the Portal within five days of members' starting a term of service
Member Timesheets	Electronically in OnCorps	Member timesheet submitted by the individual who supervises AC members. Due date established by the program in OnCorps.
Member Contract/Member Service Agreement	Initiated in DocuSign. Fully authorized original copy in member file, copy to member	Signed by member and supervisor on or before the date the member begins their term of service
Member Position Description	copy (incorporated in Member Service Agreement) in member file	To be provided to Serve Wisconsin upon request and included in the Member Service Agreement
Health Care Waiver (for FT members waiving health care benefits)	Approval of the member to waive this benefit	Within 30 days of member enrollment or change of status resulting in changes to benefits availability
Health Care, Child Care Enrollment	If applicable, copy of member's enrollment form	Within 30 days of member enrollment or change in status resulting in changes to benefits availability
Member Criminal History Check(s)	Electronic of complete results in SharePoint member file	Completed on or before the individual's start date. See Section 5.2. National Service Criminal History Checks (Regulations 45 CFR 2510, 2522, 2540, 2551 and 2552; Regulations published on October 5, 2012) for additional information
Member Suspension	Supporting documentation in member file and change in status in Portal	In Portal within 30 days of change of member status



Electronic National Service Exit Form and Verification of Member Hours	Member completes electronically in My AmeriCorps Portal	Online exit and entered in Portal within 30 days of member exit date. Approved hours verified in OnCorps; hours rounded down to whole number when entered into Portal.
Member Early Exit – Compelling Personal Circumstances (not employment)	Supporting documentation in member file	Online exit and entered in Portal within 30 days of member exit date. Approved hours verified in OnCorps; hours rounded <u>down</u> to whole number when entered into Portal.
Member Early Exit – Compelling Personal Circumstances (employment)	Approval from Serve WI prior to exit; supporting docs, including info. about employment, in member file	Serve WI approval prior to exit. Online exit within 30 days of member exit date. Approved hours verified in OnCorps; hours rounded <u>down</u> to whole number when entered into Portal.
Member Early Exit – Cause	Supporting documentation in member file	Online exit and entered in Portal within 30 days of member exit date. Approved hours verified in OnCorps; hours rounded <u>down</u> to whole number when entered into Portal.
Member Mid-Term Evaluation (required for FT members)	copy in member file	Near halfway point of service for HT, TQT, and FT members. Include hours served to date.
Member End-Term Evaluation	copy in member file	Within 30 days of the end of service for all members.
Member Serious Injury or Death Report	Notify your program officer	Within 48 hours of injury during service or death.

A. Confidential Member Information (Terms and Conditions - Specific IX.C)

The program must maintain the confidentiality of information regarding individual members. The program must obtain the prior written consent of all members before using their names, photographs, and other identifying information for publicity, promotional or other purposes. Parental or legal guardian consent must be obtained for members under 18 years of age. Programs should include the consent form as part of the member contract. Programs may release aggregate and other non-identifying information, and are required to release member information to Serve Wisconsin and the Corporation and its designated contractors. The program must permit a member who submits a written request for access to review records which pertain to the member and were created pursuant to the grant.

**B. Member Eligibility Documentation (Terms and Conditions - Specific IX.B and Regulations [45 CFR 2522.200](#))
SSN & Citizenship**



Program directors should pay special attention to the requirement that members are citizens, nationals or lawful permanent resident aliens of the United States. Note that it is against Wisconsin State Law to make photocopies of vital records, such as birth and death certificates.

The Corporation utilizes an automatic, electronic verification process to satisfy this requirement. The process has two different trigger points:

- At the time of acceptance of an AmeriCorps position in the Portal (for members who enrolled electronically) OR
- At the time of enrollment in the Portal (for members whose enrollment information is entered by program staff).

When either of the situations above occurs, the prospective member's citizenship information and Social Security Number (SSN) will be sent electronically to the Social Security Administration and the Department of Homeland Security for verification; this process may take multiple weeks to finish. The SSN verification is a two-step process. The first part includes the validation of the SSN, and that the SSN is consistent with a person of the given name, gender and date of birth (DOB). The second part is a validation of citizenship eligibility. If the first part of the validation fails, the second part is not initiated. If both parts return a successful validation, the member's record in the portal will indicate "verified" in the Portal and will be visible to both the member and the program staff. Members who have served previous terms, prior to the enactment of the automatic verification, will appear as "previously served." No further action is required by the program if the member's citizenship status is listed as verified or previously served (unless requested by CNCS).

i. Procedures for manually verifying citizenship status and SSN for National Service Trust

If the individual's information cannot be automatically verified, the program will be contacted by email to request that additional documentation to support the member's citizenship status be submitted. The email may be misleading in what it is asking for, and it should, but may not, contain information about the additional documentation that is needed and how to provide it. If the email does not provide instructions on how to complete the verification process, contact the National Service Hotline and be persistent. It is important that the program stay persistent on this issue, as a member who has not had their information verified will not be able to be enrolled, access her/his education award following successful completion, and if a member is not able to be proven eligible, costs may be disallowed. The list of acceptable citizenship status documents is included in AmeriCorps Regulation 2522.200 (link above).

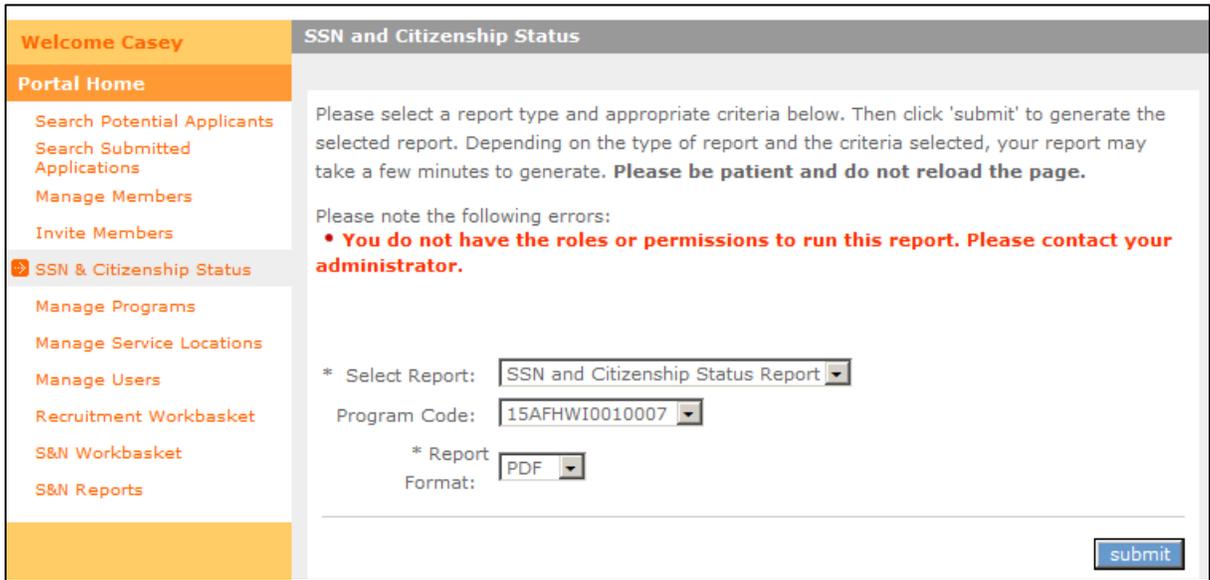
Until the "manually verified" status appears in the Portal, the system will not allow the member to be enrolled. **The program must maintain copies, in the member's file, of any citizenship verification documentation that was obtained and submitted.** If the issue persists, you may also get in touch with the National Service Hotline at 1-800-942-2677.

ii. SSN and Citizenship Status Report

It may be difficult for a program to know when a Citizenship status and/or SSN have been returned because an email may be sent to just the member, or an email may not be received all. Even after a program is aware of the situation and has taken steps with the Trust to resolve it, there may be no confirmation that it has been resolved. Therefore, it is in the program's best interest to run a SSN and Citizenship Status Report to verify which members of a given program year have an acceptable SSN and Citizenship Status. To do so the program must first contact eGrants Helpdesk to request permission to run the report. Please use your program code and specifically mention the program



years you are requesting access to and the other program codes that correspond to those years (the codes can always be found on the face sheet of your eGrants printout application). If you do not have access, you will receive an error message like the one shown below.



The screenshot shows the My AmeriCorps Portal interface. On the left is a navigation menu with options like 'Search Potential Applicants', 'Manage Members', and 'SSN & Citizenship Status'. The main content area is titled 'SSN and Citizenship Status' and contains instructions to select a report type and criteria. A red error message states: 'Please note the following errors: • You do not have the roles or permissions to run this report. Please contact your administrator.' Below the error, there are dropdown menus for 'Select Report' (set to 'SSN and Citizenship Status Report'), 'Program Code' (set to '15AFHWI0010007'), and 'Report Format' (set to 'PDF'). A 'submit' button is located at the bottom right of the form area.

As mentioned above, the automatic process will verify that the member’s DOB matches what the Social Security Administration has in their records for this individual. So if the social security number is verified, the DOB is considered valid, but the system will not automatically verify that the member meets the age requirements; thus, the subgrantee can look in the system and see if the DOB meets the minimum age requirement once the social security number is verified.

iii. Photo Identification & Member Age Eligibility Documentation

The identification of the member must be verified by the program at the time of member enrollment using a government-issued form of photo identification, such as a driver’s license or passport. Checking the individual’s photo identification helps you to ensure that the individual is who she/he claims to be and that you run the required criminal history checks using the correct name, date of birth, etc. Government-issued forms of photo identification, in addition to government-issued birth certificates, may be used. National Service Criminal History Check Documentation

Please refer to section H. National Service Criminal History Check Documentation for this information.

C. Member Enrollments – My AmeriCorps Portal/eGrants

Member enrollment data must be entered into the My AmeriCorps Portal. eGrants is the access point to the Portal for program directors and this is the official system of record for the Corporation. Programs must have their members complete the enrollment and exit forms either electronically through the Portal or via paper forms.

See section 5.1. Eligibility, Selection, and Enrollment of Members (45 CFR 2522.200 – 2522.210) and section 5.4. Exiting Members and Refilling Positions (Terms and Conditions and 45 CFR 2522.230) for more information. In addition, as stipulated in Agreement Addendum #1, programs are required to fill out the. See section Process to Enroll Members, for more information.



D. Member Service Agreements & Position Descriptions (Terms and Conditions – Specific V.B)

All members must be covered by a member service agreement that is fully-executed and in effect during their entire term of service. This means that the agreement must be signed and dated by both the member (and a parent/guardian for those under 18) and program representative on or before the member’s first day of service. Serve Wisconsin recommends that both the program director and the site supervisor are included as program representatives on the contract.

It is required to use Serve Wisconsin’s Member Service Agreement. If Serve Wisconsin’s Member Service Agreement does not work for your program, please contact your program officer to discuss using a custom member service agreement.

Any amendments to the member contract must be conveyed in writing; signed and dated by the member, by the parent/guardian for members under age 18, and program representative; and attached to the original member contract. The member must also be given a copy of the amendment for their files.

For information on how to extend a member’s service agreement past the grant contract end date, see section No-Cost Extensions (Grant Contract Article 5, Agreement Addendum #1, clause 14).

E. Member Position Descriptions (Terms and Conditions – Specific V.A, B)

Every member service agreement must incorporate a member position description (by reference or within the body of the member contract), specific to the member. Position descriptions must fully describe the duties assigned to the member and should indicate whether or not the member will have recurring access to vulnerable populations. See Section B. Member Service Projects and Policies for more guidance on allowable member activities and creating compliant member position descriptions.

F. Grievance Policy ([45 CFR 2540.230](#))

The member service agreement must contain the grievance policy to be used by individuals who wish to challenge the decisions of an organization. The grievance policy must specify that in cases where the grievance is filed by an individual applicant or participant, that remedies include the applicant’s selection or reinstatement, as the case may be and other changes in terms and conditions of service applicable to the individual. Programs must maintain documentation of grievances filed and the program’s response.

The grievance procedure must include opportunity for:

i. Alternative Dispute Resolution (ADR)

- a. ADR proceedings must be initiated within 45 calendar days
- b. The aggrieved 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
- c. ADR process must be aided by a neutral party

ii. Grievance Hearing

- a. Except for a grievance that alleges fraud or criminal activity, request must be made within one year after date of alleged occurrence
- b. Must be held no later than 30 calendar days after the grievance is filed
- c. A decisions must be made no later than 60 days after the grievance is filed



- d. The neutral party involved in the ADR may not participate in the grievance procedure, and no proceeding of the ADR may be referred to or introduced into evidence during any grievance and arbitration hearings

iii. Binding Arbitration

- a. An option if the hearing is adverse to the aggrieved party or if a decision is not made within 60 days of the filing of the grievance
- b. Arbitrator must be independent and selected by agreement of the parties
- c. If the parties cannot agree on an arbitrator within 15 calendar days after receiving a request from one of the grievance parties, the Corporation's Chief Executive Officer will appoint an arbitrator from a list of qualified arbitrators
- d. Must be held no later than 45 calendar days after the request for arbitration, or, if the arbitrator is appointed by the Corporation's Chief Executive Officer, the proceeding must occur no later than 30 calendar days after the arbitrator's appointment
- e. A decision must be made no later than 30 days after the commencement of the proceeding
- f. Cost of arbitration must be divided evenly between the two parties, unless the aggrieved party prevails, in which case the program must pay the total cost of the proceedings plus the prevailing party's attorney's fees
- g. If a grievance is filed regarding a proposed placement of a participant, such placement must not be made unless the placement is consistent with the resolution of the grievance

G. Member Benefits

For eligible members, the member file must include enrollment and/or waiver information for health care and child care. All members should be informed of their eligibility for AmeriCorps benefits such as the living allowance, health care, student loan forbearance, and childcare; this should be documented.

If members serving the same terms of service receive varying living allowance amounts, the program must document the rationale behind this variance and this documentation should be retained in the member file. This must be based on allowable factors, such as members serving in areas with higher/lower costs of living. See Section Payment Amounts.

H. Member and Staff Timekeeping (Terms and Conditions – Specific V.H, 2 CFR, & Office of Management and Budget Guidance)

Serve Wisconsin requires that all programs use OnCorps as the official timekeeping system for members. Programs are required to ensure that time and attendance recordkeeping is conducted by AmeriCorps members. Time logs must be entered into and approved in the OnCorps online timekeeping system on a regular basis. Members should always be describing their service in OnCorps on their timesheets, but they should use extra detail whenever serving longer than eight hours on any given day. Members should enter descriptions for each individual day served.

Program directors must set up the OnCorps time tracking system and instruct members so that they separately record time spent on service, fundraising, and training correctly. OnCorps regularly offers training webinars and tutorials can be found on their website under the Help menu tab. Members must maintain their own timekeeping account and password and enter their hours directly. Site supervisors must also have an OnCorps account so that the individual directly overseeing the member's service is the one to approve the timesheets in OnCorps.



Staff timesheets are required for individuals whose salary is paid in full or in part by grant funds or grantee match funds (cash or in-kind). OnCorps includes site supervisor in-kind hours reporting as a service to programs to facilitate calculations of site supervisor match; however, the OnCorps system for site supervisors does NOT meet CNCS requirements regarding timesheets for personnel listed on the AmeriCorps grant so programs must ensure that site supervisors keep another time record that does meet these requirements.

Timekeeping requirements differ for Professional Corps programs which have received written Corporation approval to use the timekeeping practices of their profession. Approved staff timesheets must accurately divide time between AmeriCorps grants and other responsibilities, signed by the staff person and a supervisor, and must track actual time, not percentages. Reports reflecting the distribution of activity of each employee must be maintained for all staff members (professionals and nonprofessionals) whose compensation is charged, in whole or in part, directly to awards. For more information see below and the applicable 2 CFR Appendixes.

i. Staff Timekeeping Requirements for Non-profit Organizations

[\(2 CFR Appendix B to Part 230, Section 8, Compensation for Personal Services\)](#) Reports maintained by non-profit organizations to satisfy these requirements must meet the following standards:

- a. The reports must reflect an after-the-fact determination of the actual activity of each employee. Budget estimates (i.e., estimates determined before the services are performed) do not qualify as support for charges to awards.
- b. Each report must account for the total activity for which employees are compensated and which is required in fulfillment of their obligations to the organization.
- c. The reports must be signed by the individual employee, or by a responsible supervisory official having first-hand knowledge of the activities performed by the employee, that the distribution of activity represents a reasonable estimate of the actual work performed by the employee during the periods covered by the reports.
- d. Reports must be prepared at least monthly and coincide with one or more pay periods.

ii. Staff Timekeeping Requirements for Educational Institutions

[\(2 CFR Appendix A to Part 200, Section J.10, Compensation for personal services\)](#) Compensation for personal services covers all amounts paid currently or accrued by the institution for services of employees rendered during the period of performance under sponsored agreements. Such amounts include salaries, wages, and fringe benefits (see subsection J.10.f of this Appendix). These costs are allowable to the extent that the total compensation to individual employees conforms to the established policies of the institution, consistently applied, and provided that the charges for work performed directly on sponsored agreements and for other work allocable as F&A costs are determined and supported.

- a. Plan-Confirmation: Under this method, the distribution of salaries and wages of professorial and professional staff applicable to sponsored agreements is based on budgeted, planned, or assigned work activity, updated to reflect any significant changes in work distribution.
- b. After-the-fact Activity Records: Under this system, the distribution of salaries and wages by the institution will be supported by activity reports.
- c. Multiple Confirmation Records: Under this system, the distribution of salaries and wages of professorial and professional staff will be supported by records which certify separately for direct and F&A cost activities.



iii. **Staff Timekeeping Requirements for State, Local, and Tribal Governments – See [2 CFR 225 Appendix B](#)**

iv. **Members Submitting Service Prior to the Date it Occurs**

A member should never submit hours for future days, and a supervisor should never approve a timesheet that was submitted prior to the end of the days served. If this happens, the program staff must return the timesheet to the member and have them resubmit after the hours were actually served.

OnCorps has a few features that help spot this error but will not prevent it entirely. In the screenshot below we see that this member submitted her/his timesheet on February 16, while the timesheet period is for February 16 to February 28. OnCorps automatically highlights, in a light yellow, any days in a timesheet that are after the date of submission. Any hours that are submitted on days that are highlighted yellow will be questioned and should be returned to the member to have the timesheet verified and be resubmitted. In the example picture below, the timesheet must be returned to the member to be changed for the hours entered on February 17, 19, and 23.

OnCorps also enters a statement in red where the site supervisor would make his/her approval that states, "Time entered after today's date, this timesheet cannot be approved until after the date of the last time entered."



You are approving time entered for period: 02/16/2017 - 02/28/2017

This time sheet is DUE: 03/05/2017
This time sheet was submitted for approval on 02/16/2017 at 5:02 PM

Day	Fund raising	Training	Service		Total Hours
		Training	Direct Service	Funraising	
Thu Feb 16	0	0	8	0	8
Description: test service					
Fri Feb 17	0	1	5	0	6
Description: does this show up yellow					
Sat Feb 18	0	0	0	0	0
Description:					
Sun Feb 19	0	0	8	0	8
Description: I know for sure I am gonna serve these hours					
Mon Feb 20	0	0	0	0	0
Description:					
Tue Feb 21	0	0	0	0	0
Description:					
Wed Feb 22	0	0	0	0	0
Description:					
Thu Feb 23	0	0	8	0	8
Description: some more for sure service					
Fri Feb 24	0	0	0	0	0
Description:					
Sat Feb 25	0	0	0	0	0
Description:					
Sun Feb 26	0	0	0	0	0
Description:					
Mon Feb 27	0	0	0	0	0
Description:					
Tue Feb 28	0	0	0	0	0
Description:					
Totals:	0	1	29		30
Comments/Description:					

Approve/Reject Time sheet(s) (select one)

I have reviewed and **approve** this Time sheet(s).
Time entered after today's date, this timesheet cannot be approved until after the date of the last time entered

I have reviewed and **DO NOT approve** this Time sheet(s). (AmeriCorps Member will be notified to correct and re-submit this time sheet)

Comments:

I. Member Performance Evaluations (Terms and Conditions - Specific V.E, [45 CFR 2522.220\[c\]](#), [45 CFR 2526.15](#))

All full-time, three-quarter time, and half-time members must have a mid-term written evaluation; mid-term evaluations are not required for full-time members who exit before the mid-point of their terms. All members, regardless of term of service or successful completion, must have a written end-of-term evaluation. Member evaluations should contain both the member's and supervisor's signatures and be dated by both parties.

i. Minimum Requirements

The end-of-term evaluation should address at a minimum:

1. whether the member has completed the required number of hours (must state the number of hours completed to date and how many hours the member has left to serve)



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.

ii. Evaluations for Members Who Exit Early

All members who exit early must have a member end-of-term evaluation completed at the time of their exit and the evaluation must be maintained in the member file. They are not required to have a mid-term evaluation if exited before the mid-point of their service. Completing the exit form in the eGrants/My AmeriCorps Portal is not sufficient to meet the evaluation requirement. If a member is unavailable to sign the end of term evaluation, program directors should make a note of attempts to contact the member, sign, and date the document (see section Members that Leave without Completing Exit Process).

J. Member Training

Programs should use sign-in sheets, webinar attendance logs, or other methods to document member attendance at and completion of program-provided member trainings. If a member attends an outside training to fulfill specific AmeriCorps program requirements, he/she should turn in to the program director an agenda or confirmation notice signed and dated by the training facilitator for retention in the member file. In instances of virtual trainings, a member should print a screenshot to sign and date for documentation, or print/sign/date the post-training follow-up notice and materials.

See Section B. Required and Suggested Member Training.

K. Member Exits – Paper Forms and My AmeriCorps Portal/eGrants

All members must be exited in the Portal as this is the official system of record for the Corporation. Programs exit members with a completely electronic process by having the member complete the exit form in the Portal. As the program is managing the member exit process, they need to be mindful of the Corporation's 30-day exit requirement between the member's exit date and the completion of the eGrants exit process and allow adequate time to collect information and record it in the Portal (as needed).

Prior to exiting a member, the program must verify the number of approved hours served by the member in OnCorps. The program will enter this number of approved hours in eGrants, rounded down to the next whole number. It is also highly recommended that the program director ensure that all required documents are included in the member's file. That will enable the program director to attempt to obtain any missing documents prior to exiting the member.

i. Failure to Complete – Repercussions on Program

The program should be aware that failure to include a fully completed member exit form may result in the questioning and recapturing of the education award from the program during audit. Therefore, the program director should make every effort to have a signed member exit form (electronically approved in eGrants is acceptable) for all members, regardless of the type of exit.

ii. Failure to Complete – Repercussions on Member

All members must complete the program's exit process. A member who does not fully complete the exit process will be deemed not to have met program requirements and therefore will be ineligible for an education award (even if they complete all other aspects of the program successfully).

iii. Members that Leave without Completing Exit Process



If a member leaves their term of service without completing the exit forms, the program should make several attempts to contact the member to complete the forms and retain documentation of these attempts. Programs should be mindful of the CNCS 30-day requirement for exits as they determine the policies for these situations. Timelines and contacts made with members should allow adequate time to make several contacts and exit the member within the 30-day timeframe.

In cases where it is impossible for the member to complete the exit process resulting from the death of the member or otherwise, the program should exit the member within 30 days of the last day of service. The program should navigate to the exit form in the MyAmeriCorps Portal via the pending exits tab of the workbasket if required exit date is within the next month. If the exit needs to be unlocked because the expected date is far in the future, the program should pull up the member by searching by name or NSPID under Manage Members. The unlock icon is available under member home page.

My AmeriCorps includes an option for the program to bypass the member-certified exit. This is needed because the member is not available to certify their own exit on paper or via My AmeriCorps. The member exit certification bypass option is found on the member part of the exit form. Scroll to the bottom of the member portion of the exit to find it. To proceed with this option, the program must document in the member file the reason(s) the member could not complete their portion of the exit form. The burden of proof is on the program. For a member who has died, CNCS does not specify that a death certificate or other evidence is required.

Next, the program will complete the program part of the exit process. For a member who has died, the member would be exited by the program for compelling personal circumstances. If the member is younger than 55 the member could also be exited for cause since no award could be accessed by a designated transferee. The same documentation would be used to support the compelling personal circumstances exit as would be used to support the member exit certification bypass.

The program should complete the end of term evaluation even though no subsequent service will be completed by the member. The program should explain in the file why other elements of the program's exit process (such as member survey, if applicable) are not able to be followed.

iv. Program Requirements to Attempt to Obtain Exit Paperwork

The communication to the member should provide instructions on completing the exit and provide a specific timeline in which the member should complete the exit. Multiple attempts using multiple methods of contacting a member should be used. All of these attempts should be documented in the member file – for example, copies of email messages, copies of letters/memos, copies of certified mail return receipts, and written notes documenting phone or text messages are examples of appropriate documentation for this purpose. If, despite these attempts, the program is unable to obtain the completed exit form, they should manually complete a paper exit form for the member and exit them in the Portal. They should attach documentation of their contact attempts to the paper exit and make a written notation on the exit form itself saying, “The program was unable to obtain a completed exit from the member.” This message should be signed and dated by the program director and all of these documents should be maintained in the member's file.

L. Disciplinary Actions

Programs should have a disciplinary policy that outlines steps that may be taken when members fail to comply with expectations. Programs should document in the member file whenever disciplinary problems arise and the corresponding action (verbal warning, written warning, etc.) that is implemented.



M. Suspensions or Early Exits/Terminations

If the program suspends or exits a member early, whether for cause or for compelling personal circumstances, the reason for the suspension or exit must be documented in the member file. Regardless of the sensitivity of the issue, programs are required to maintain acceptable supporting documentation of this information in the member files (which should be secured and confidential).

5.9 Member Activities

A. Creating Compliant Position Descriptions ([Terms and Conditions - Specific V.A](#))

Programs should use the following guidelines to ensure that member position descriptions accurately and adequately describe the allowable duties assigned to the member.

1. Indicate any minimum qualifications for the position.
2. Are specific to each member (unless members are performing the exact same activities).
3. Do not contain the phrase, “other duties as assigned” or other vague statements about member responsibilities.
4. Describe all member activities explicitly to ensure that prohibited activities are not included.
5. Do not use “employment” terms like: “work/job,” “job description,” “hired,” “employee,” etc. Instead, use the appropriate national service terminology such as “serve/service,” “position description,” “enrolled,” and “member/service participant.”
6. Avoid abbreviations or acronyms – if used, spell out the term at the first usage and then use the acronym/abbreviation later in the document.
7. If a member position description includes member participation in volunteer recruitment, management, or similar activities, a brief description of the potential volunteer activities for which the member will be recruiting must be added within the position description itself. For example, “Recruit and manage volunteers to support the afterschool program.”

See Section E. Member Position Descriptions for more information regarding member position descriptions.

B. Fundraising & Training

i. Member Fundraising ([45 CFR 2520.40-45](#))

AmeriCorps members may raise resources directly in support of a program's service activities; however, they are excluded from raising funds for their living allowance, for an organization's operating expenses or endowment, and writing grant applications for CNCS grants including AmeriCorps grants, or any other federal grants. All programs are required to ensure that individual members limit their time spent fundraising as defined in [45 CFR 2520.40](#) to not more than 10 percent of their term. Further, programs are required to identify fundraising, training and service hours separately on the member time records. Members who do not engage in fundraising activities should indicate zero hours on their time records in the *Fundraising* area.

ii. Member Training ([45 CFR 2520.50-55](#))

Members are required to receive certain trainings (see the 5.10. Member Training (Terms and Conditions, 45 CFR 2520.50, and 2522.100)). Since all members are required to receive training, members with zero training hours listed will raise concerns in member monitoring. No more than 20% of the aggregate of all AmeriCorps member service hours in your program, as reflected in the member enrollments in the National Service Trust, may be spent in education and training



activities. Capacity-building activities and direct service activities do not count towards the 20% cap on education and training activities.

C. Prohibited Activities (Terms and Conditions - Specific V.C and [45 CFR 2520.65](#))

The Corporation has placed a strong emphasis on monitoring for prohibited activities. All programs should make note of the prohibited activities and ensure that members, site supervisors, and other staff are well-versed in the prohibited activities. All locations where members serve should post a list of the prohibited activities, when possible. It is required that prohibited activities are covered in the Member and Site Supervisor Orientation, as well as specifically detailed in the member contract. These prohibited activities include:

- i. Attempting to influence legislation;
- ii. Organizing or engaging in protests, petitions, boycotts, or strikes;
- iii. Assisting, promoting, or deterring union organizing;
- iv. Impairing existing contracts for services or collective bargaining agreements;
- v. Engaging in partisan political activities, or other activities designed to influence the outcome of an election to any public office;
- vi. 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;
- vii. 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;
- viii. Providing a direct benefit to –
 - a. a business organized for profit;
 - b. a labor union;
 - c. a partisan political organization;
 - d. 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
 - e. an organization engaged in the religious activities described in paragraph vii of this section, unless Corporation assistance is not used to support those religious activities;
- ix. Conducting a voter registration drive or using Corporation funds to conduct a voter registration drive;
- x. Providing abortion services or referrals for receipt of such services; and
- xi. Such other activities as the Corporation may prohibit (see Additional Prohibited Activities)

D. Additional Prohibited Activities ([45 CFR 2520.40](#))

Other prohibited activities include:

- i. Members raising funds for their living allowance
- ii. Raising funds for program operating expenses or endowment
- iii. Writing grant applications for CNCS grants, including AmeriCorps
- iv. Writing grant applications for funding provided by other federal agencies



- v. Recruiting volunteers to perform prohibited activities or distributing materials related to prohibited activities (i.e. activities in support of the Prohibited Activities are not allowed. For example, it is not allowable for an AmeriCorps member to recruit community volunteers to perform a prohibited activity, such as voter registration drives, nor is it allowable for an AmeriCorps member to distribute materials related to a prohibited activity, such as registration information for religious instruction.)
- vi. Census Activities. AmeriCorps members and volunteers associated with AmeriCorps grants may not engage in census activities during service hours. Being a census taker during service hours is categorically prohibited. Census-related activities (e.g., promotion of the Census, education about the importance of the Census) do not align with AmeriCorps State and National objectives. What members and volunteers do on their own time is up to them, consistent with program policies about outside employment and activities.
- vii. Election and Polling Activities. AmeriCorps member may not provide services for election or polling locations or in support of such activities. AmeriCorps members may not engage in the above activities directly or indirectly by recruiting, training, or managing others for the primary purpose of engaging in one of the activities listed above. Individuals may exercise their rights as private citizens and may participate in the activities listed above on their initiative, on non-AmeriCorps time, and using non-CNCS funds. Individuals should not wear the AmeriCorps logo while doing engaging in any of the above activities on their personal time.

E. Teleservice ([Terms and Conditions – Specific V.E.](#))

AmeriCorps members should generally be providing service directly to the people and in the communities where they serve rather than performing service remotely. Therefore, teleservice should be limited to certain situations. Teleservice—like all service—should have appropriate documentation, supervision and oversight.

A grantee may determine that teleservice is appropriate based on the situation (e.g., COVID-19 public health emergency) and type of service being delivered (e.g., tutoring via telephonic or video conference). 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 or update an existing policy to address the following:

- 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 accompaniment, as necessary), 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.

5.10 Member Training ([Terms and Conditions](#), [45 CFR 2520.50](#), and [2522.100](#))

The program must provide members with adequate supervision by qualified supervisors consistent with the approved grant application. Any questions or requests for clarification regarding the information below and ongoing programmatic training and technical assistance may be directed to the assigned program officer.



A. Member Orientation ([45 CFR 2522.100 \(g\)\(2\)](#), and [National Policy FAQs](#))

Programs must conduct a member orientation designed to enhance member sensitivity to the community and comply with any pre-service orientation or training required by the Corporation. At a minimum, these items should be covered during orientation and explicitly listed on the member orientation agenda:

- i. Member rights and responsibilities, including the Program's code of conduct,
- ii. Prohibited activities (including those specified in the regulations),
- iii. Requirements under the Drug-Free Workplace Act (41 U.S.C. 701 *et seq.*) & [2 CFR 182](#),
- iv. Suspension and termination from service,
- v. Member contracts,
- vi. Grievance procedures,
- vii. Sexual harassment, other non-discrimination issues, and other topics as necessary,
- viii. National Service, CNCS, Serve Wisconsin, AmeriCorps in Wisconsin,
- ix. Host site/service partners if applicable,
- x. Communities where the members will serve
- xi. Offer reasonable accommodations

B. Required and Suggested Member Training

Required training topics and suggested training ideas are covered below. Training should also include structured opportunities for members to reflect on and learn from their service. The training requirements vary and are indicated below for each topic/idea.

Required for Youth Corps Programs:

CPR/First Aid

Required for Youth Corps programs regardless of position type except Education Award Programs; recommended for multi-site placement programs. As mentioned in section J. Member Training, programs that are required to provide CPR/First Aid training to members must keep copies of certification or the completed Serve Wisconsin form in member files for documenting member participation in the training.

Required For All Programs (Except Education Award Programs):

Conflict Resolution

Conflict Resolution Training is required for all programs except Education Award Programs, per your AmeriCorps Grant Agreement Addendum #1.

Required For Programs Engaged In Literacy Tutoring Programs:

Tutoring Training

Tutor Training is required for those programs engaged in literacy tutoring activities in schools and after-school programs. See [45 CFR 2522.900 – 2522.950](#) for tutoring program guidelines.

Suggested Trainings:

Volunteer Management

Volunteer management training is not required but can be provided to members. This type of training is most often accessed through your local United Way, Volunteer Center or Community College. Volunteer Generation Fund grantees may also be available to provide this training.



Life after AmeriCorps

Life after AmeriCorps training is not required but may be accessed through any of these means: AmeriCorps Alums, National Service Resources, Service Year, a college/university career center, etc. Thinking about how to engage your alumni is an important piece of program management, as it will pay returns in member recruitment, volunteer recruitment and more.

Disaster Services

Serve Wisconsin provides disaster services training for the AmeriCorps Disaster Response Team. If you want to include disaster training for your AmeriCorps program, please contact Serve Wisconsin to coordinate.

CNCS Training

[Online courses](#) are also offered by the Corporation that may be used as training resources.

C. Site Specific Training

Members should be provided the benefit of additional training and education opportunities relevant to their service and personal development, at the discretion of the program and approval by program director; however, programs should ensure that members do not spend more than 20% of the aggregate of all AmeriCorps member service hours in your program, as reflected in the member enrollments in the National Service Trust, in education and training activities. As with fundraising, programs are required to identify training hours separately on the member time records. For more guidance on member time requirements around training and fundraising see Section C. Fundraising & Training.

D. Training Collaboration and Providers

When planning for trainings, one option for programs is to reach out to local organizations and qualified individuals to conduct some of the required training topics in order to foster community awareness and partnerships. Programs are encouraged to open required trainings, service projects, and other general formal or informal gatherings of your members to members from other programs in the area in order to facilitate a local network of service and support.



Chapter 6 – Financial and Grant Management

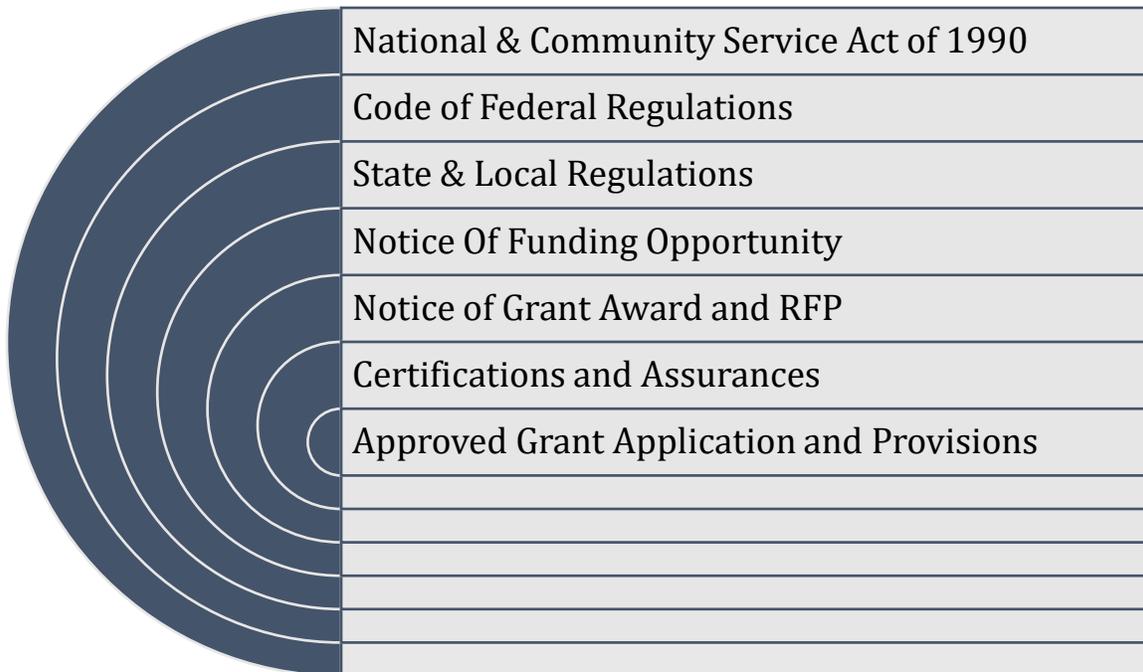
6.1 Grant & Financial Management Overview

The grantee has full fiscal and programmatic responsibility for managing all aspects of grant and grant-supported activities, subject to the oversight of Serve Wisconsin. It is important for there to be a clear understanding that grant and financial management are inextricably linked. That is, poor member and program management have negative impacts on financial management because compliance issues often result in disallowed costs. It is the responsibility of all staff to be aware of effective grants and financial management standards, be good stewards of federal resources by practicing strong financial, grant, program and member management and to work to continually improve the systems and practices used in these areas.

The grantee is accountable to Serve Wisconsin and CNCS for its operation of the Serve Wisconsin AmeriCorps Program and the use of AmeriCorps funds. Although programs are encouraged to seek the advice and opinion of the Commission on special problems that may arise, such advice does not diminish the program’s responsibility for operating decisions.

6.2 Regulations & Requirements

Effective financial management of an AmeriCorps program requires familiarity and reference to numerous documents that detail the requirements and provide guidance on implementation of the various components of the program. This manual provides an overview, but programs are expected to review the financial management documents on a regular basis to ensure program compliance and continuous improvement.



A. Code of Federal Regulations

- i. [45 CFR](#)
[45 CFR Subtitle B, Chapter XXV](#) contains the regulations for the Corporation for National and Community Service. Sections in these regulations were amended to update [National Service](#)



[Criminal History Check regulations](#). Below is a table of some notable topics and where they can be found in the regulations.

Topics	Citation in the AmeriCorps Regulations
Member Service Activities	2520.20 – 2520.55
Prohibited Activities	2520.65
Tutoring Programs	2522.900 – 2522.950
Matching Funds	2521.35 – 2521.90
Member Benefits	2522.240 – 2522.250
Calculating Cost Per Member Service Year (MSY)	2522.485
Performance Measures	2522.500 – 2522.650
Evaluation	2522.500 – 2522.540 and 2522.700 – 2522.740
Selection Criteria and Selection Process	2522.400 – 2522.475

If there is any inconsistency between the AmeriCorps regulations, the RFP, and the Application Instructions, the order of precedence is as follows:

1. AmeriCorps regulations 45 CFR 2520 – 2550 take precedence over the
2. Request for Proposals, which takes precedence over the
3. Application Instructions.

ii. **[2 CFR 200](#) – Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards**

The Uniform Guidance took effect on December 26, 2014. Fixed Amount awards are not subject to the cost principles in 2 CFR, Part 220, Subpart E. Fixed Amount awards must comply with the remaining Terms and Conditions of 2 CFR Part 220, including Subpart F relating to audit requirements. Fixed Amount awards include Education Award program (EAP) Fixed Amount awards, Professional Corps Fixed Amount awards, and Full-Time Fixed Amount awards.

It seems like it would go without saying, but it is very important that you read this guidance. Organizations should follow the guidance based on what the organization can be classified as (e.g., institutions of higher education, nonprofit organizations, etc.)

B. State and Local Regulations

These often have implications on financial management practices, documentation, employment status of members, and subsequent coverages, etc. Each program is expected to comply with all federal and state laws.

C. [Grant Terms and Conditions](#) (Including the certifications and assurances that are agreed upon by the program at the time of application submission.)

Terms and Conditions are the guiding principles for CNCS-funded grants. Make sure you are reviewing both the Terms and Conditions for AmeriCorps State and National Grants and the General Terms and Conditions.

D. Notice of Grant Award

Reviewing the notice of grant award from the Corporation documents the purpose of the award, the budget and performance periods, and the terms of acceptance.



E. Approved Grant Application and Budget

Your approved grant application as it exists in eGrants is a binding document. The grantee agrees to operate the funded program in accordance with the approved grant application and budget, supporting documents, and other representations made in support of the approved grant application. As such, the application should be referred to often, and for certain changes, it is required that you notify your assigned Program Officer (see section G. Notice to Serve Wisconsin).

F. [Request for Proposals \(RFP\) and Application Instructions](#)

These contain specific financial details that change on an annual basis (such as the maximum living allowance).

G. AmeriCorps Grant Agreement & Addendum

The Grant Agreement issued by Serve Wisconsin that governs the grant in Wisconsin contains specific reporting deadlines and other details. The Grant Agreement binds the program to comply with its approved grant application (including the certifications and assurances to which the program agrees to at the time of application) and the Corporation's regulations and Terms and Conditions, which are incorporated by reference into the grant agreement. In addition, the Notice of Funding Opportunity/RFP and Application Instructions are also incorporated by reference into the Grant Agreement.

H. [The National and Community Service Act of 1990 as amended by the Serve America Act](#)

Signed by President Bush, this legislation authorizes grants to schools to support service-learning through Serve America and demonstration grants. Learn and Serve America is created. In 2009 this was amended by the Serve America Act to expand and strengthen national service programs.

I. Required AmeriCorps Policies

The organization shall ensure that the relevant required AmeriCorps policies are incorporated into organizational policies or maintained in a section of the overall policies to meet the Serve Wisconsin requirements. (Examples of required AmeriCorps policies include: staff and member criminal history record check, member grievance procedures, members being required to wear AmeriCorps gear, member service projects, personal identifying information etc.)

J. Code of Conduct for Employees Engaged in the Award and Administration of Grants and Contracts

A written code of standards for conduct shall be maintained by the program and shall govern the proper behavior and performance of officers, employees, members, volunteers or agents in conducting the work of the organization. The code of conduct should encourage ethical behavior, accountability and transparency while discouraging or prohibiting unethical behavior, discrimination, breaches of confidentiality, and other undesirable, dangerous, or illegal behavior.

A code of conduct includes, at minimum, rules covering the following issues:

- illegal drug use,
- criminal convictions and their impact on employment,
- laws and regulations,
- confidentiality,
- discrimination,
- use of agency property,
- how to report illegal, unethical or questionable behavior, and



- conflicts of interest practices, ensuring conflicts of interest are avoided in the procurement, and utilization, of all AmeriCorps-related goods and services (including placement/award of members).

These standards shall provide that no officer, employee, or agent shall:

- Solicit or accept gratuities, favors, or anything of monetary value from suppliers or potential suppliers
- Participate in the selection, award, or administration of a procurement (including a member position), where to the individual's knowledge, any of the following has a financial or other substantive interest in any organization which may be considered for award:
- The person participating is an officer, employee, or agent of one of the organizations under consideration for an award
- Any member of his or her immediate family (defined as: wife, husband, son, daughter, mother, father, brother, brother-in-law, sister, sister-in-law, son-in-law, daughter-in-law, mother-in-law, father-in-law, aunt, uncle, niece, nephew, grandparent, grandchild, stepparent, and stepchild)
- A person, or organization, which employs any of the above or with whom any of the above has an arrangement concerning prospective employment

K. Notice to Serve Wisconsin

In addition to regular reporting, the grantee must notify Serve Wisconsin when other conditions arise. Some examples of these situations are noted below. Other notifications are related to member and program management and are covered in other areas of this handbook.

i. Developments or Delays (Terms and Conditions)

The Program Director, or other program representative, will notify their Serve Wisconsin Program Officer immediately of any developments or delays that have a significant impact on funded activities, any significant problems relating to the administrative or financial aspects of the grant, or any suspected misconduct or malfeasance related to the grant or grantee. The Program Director, or official, will also inform the Serve Wisconsin official about the corrective action taken contemplated by the program and any assistance needed to resolve the situation.

ii. Waste, Fraud, and Abuse (Terms and Conditions)

Programs must immediately contact the OIG, and their Program Officer when they first suspect that:

1. A criminal violation has occurred (see 18 U.S.C. Part I for more information on criminal conduct.), such as:
 - a. Criminal fraud.
 - b. Theft or embezzlement.
 - c. Forgery.
 - d. Corruption, bribery, kickbacks, or acceptance of illegal gratuities or extortion.
2. Actual or suspected fraud, waste, or abuse has occurred.
 - a. Fraud involves obtaining something of value through willful misrepresentation.



- b. Waste involves the taxpayers not receiving reasonable value for money in connection with any government funded activities due to an inappropriate act or omission by players with control over or access to government resources.
- c. Abuse involves behavior that is deficient, or improper, when compared with behavior a prudent person would consider reasonable and necessary business practice, given the facts and circumstances. Abuse also includes misuse of authority, or position, for personal financial interests or those of an immediate or close family member or business associate.

iii. Programmatic Changes ([45 CFR 2543.25](#)) and AmeriCorps Program Modification Guidelines)

Grantees must obtain the prior written approval of Serve Wisconsin before making the following changes in the approved program. Some changes may also require prior approval by CNCS:

- **Scope or Goals of the Program**
Changes in the scope or goals of the program, whether or not they involve budgetary changes.
- **Performance Measures**
Changes to the approved program performance measures.
- **Key Personnel**
Changes in key personnel identified in the application or award document (this includes all staff listed on the budget under federal share or match).
- **Reduction or Absence of Program Director**
The absence for more than three months, or a 25% reduction in time devoted to the project, by the approved project director. Programs must have an interim director identified, and available, during extended absences. No program can operate without an AmeriCorps Program Director.
- **Changes in Member Supervision**
Substantial changes in the level of member supervision, including addition or loss of program sites.
- **Contracting or Sub-Granting AmeriCorps Activities**
Entering into sub-grants or contracting out any Wisconsin AmeriCorps program activities funded by the grant and not identified in the approved application.
- **Change in Program Design**
Including the following changes:
 - Converting full-time positions to part-time positions and vice versa
 - Changing a member status from full-time to part-time or vice versa
- **Exiting a Member for Compelling Personal Circumstance**
Programs must request prior approval to exit a member early for compelling personal circumstances. See D. Early Termination for Compelling Personal Circumstances.

L. Financial Management Resources

Financial management resources can be found on Basecamp: [Serve Wisconsin AmeriCorps Programs](#) → Docs & Files → Program Resources → Financial Guidance

6.3 Financial Management

Below is a list of important financial procedures:



- i. Prepare and analyze financial reports on, at least, a quarterly basis. Ensure they are consistent, timely, and accurate.
- ii. Maximize segregation of financial duties to serve as a checks and balances system to ensure adequate documentation is kept and organized. This system should be proportional to the size of the organization's resources.
- iii. Adopt written financial procedures to monitor routine expenses.
- iv. Periodically assess risks and purchase appropriate levels of insurance to manage liabilities and protect assets.
- v. For nonprofit organizations, ensure a written process for determining compensation for executive and other employees is in place. This process must include review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision.
- vi. Prohibit loans to board members, Executive Director, and personnel.
- vii. Ensure board prohibit salary advances without adequate policy/procedures for authorization, and specific written approval documentation for each instance, to be communicated with the overseeing Board of Directors.
- viii. Board members, financial staff, and executive leadership can interpret financial statements.
- ix. Comply with federal, state, and financial regulations.
- x. Complete state and federal returns/reports (such as 990, Secretary of State Report (if required)), including information about the year's activities/outcomes. Board of directors and leadership should receive a copy of the report.
- xi. Organizations whose federal expenditures exceed \$750,000, for the fiscal year, must have a single or program-specific audit conducted for that year, in accordance with Government Auditing Standards and Wisconsin's State Single Audit Guidelines. AmeriCorps fund recipients must follow the audit/financial review requirements in ARTICLE 32. SINGLE AUDIT REQUIREMENTS of the AmeriCorps Grant Agreement.
- xii. Designate an audit committee to hire the auditor, oversee the audit process, meet with the auditor to review the report, and present the audit to the Board for review and approval. (Nonprofit organizations)
- xiii. Have procedure to protect individuals from repercussions for reporting financial misconduct.
- xiv. Provide annual financial statements, and returns, to constituents if requested.
- xv. Avoid recurring deficits, and secure adequate funding, to fulfill mission statement and corresponding activities. Ensure expenditures are in accordance with funding conditions.
- xvi. Ensure assets are used to benefit the organization and not personal, or other gains. A clear conflict of interest policy shall be employed, reviewed, and approved annually by the nonprofit's Board of Directors. Nonprofits that invest in, contribute assets to, or participate in a joint venture, with a taxable entity, are required to have written procedures regarding the arrangement to safeguard the organization's exempt status.

6.4 Financial Policies and Procedures

All programs shall operate under written financial management procedures. These policies should be available for review by CNCS, Serve Wisconsin, or other party acting on Serve Wisconsin's behalf.

A. Financial Systems Start-Up Checklist

___ **Become familiar with applicable sections of 2 CFR**

Agencies receiving federal funds should have access to and be familiar with [Title 2 of the Code of Federal Regulations](#).



___ Set up AmeriCorps program accounts in the accounting system for CNCS share, Cash Match, & In-Kind

The AmeriCorps program must be a separate account or have a separate account number. All Corporation grant awards must be tracked separately. Devise a system to reconcile the grantee budget with the approved Corporation budget included with the award.

___ Create a system for the disbursement of stipends

Members must receive stipends in equal installments over the term of service. The stipend is not dependent on the number of hours worked in any service period. The stipend is taxable.

___ Create a documentation system for staff time

You must have signed individual time distribution records for staff members charged to the grant (in whole or in part) identifying all time and costs chargeable and not chargeable to the grant (distinguishing administrative and programmatic functions). Time distribution records and systems must comply with 2 *CFR 200.430*, and specifically with 200.430(i) *Standards for Documentation of Personnel Expenses*.

___ Ensure that you have appropriate liability insurance

Programs shall have sufficient liability insurance to protect the organization, employees, and members. Members engaged in both on- and off-site project activities must be covered. Ensure current policies cover non-employees in special statuses, such as members.

___ Track in-kind services

Track in-kind match. This includes donations and staff time.

___ Track cash match

A system must be in place to track cash match. Programs are expected to meet operating cost match by the end of the program year.

B. General Policies

Reasonable, Allocable and Allowable

Procedures shall be established for determining reasonableness, allocability, and allowability of costs, in accordance with applicable cost principles and grant terms. Apply procedures consistently across all programs.

i. Reasonable

To be reasonable, a cost must:

- Be consistent with the judgment of any prudent person under the circumstances prevailing at the time the cost is incurred or allocated.
- Be generally recognized as ordinary and necessary for the operation of the grant or program, or cost objective being charged.
- Be consistent with sound business practices, established laws and regulations, and terms of the program being charged.
- Be consistent with the market price for comparable goods or services.
- Deviations from established practices by the entity is explained and justified.



- Be authorized, or not prohibited, under state or local laws or regulations.
- Conform to any limitations or exclusions set forth in these principles, federal laws, or other governing limitations to type or amount of cost items.
- Accorded consistent treatment through application of generally accepted accounting principles appropriate to the circumstances.
- Not be allocable to, or included, as a cost of any other program in either the current or a prior period.
- Be net of all applicable credits.
- Be adequately documented.

ii. Allocable

A cost that can be assigned, or charged, to activities or items (cost objects) on the basis of benefits received, or other such equitable or logical association, although a direct (causal) relationship may not be established. A shared cost that is allocable to a program may not be shifted to another program to avoid a funding deficiency, regulatory restriction, rule, contract, or any reason not reflective of the benefit received. A shared cost is allocable:

- Based on its relative benefits received
- If it is treated consistently with other costs incurred for the same purpose in like circumstances and if it:
 - Is incurred specifically for the award,
 - Benefits both the award and other work, and can be distributed in a reasonable proportion to the benefits received,
 - Is necessary to the overall operation of the organization.

iii. Allowable

To be allowable, costs must:

- Be necessary, and reasonable, for the proper and efficient administration of the Serve Wisconsin AmeriCorps Program,
- Conform to grant award limitations and cost principles,
- Be consistent with policies, and procedures, applicable to the federal and non-federal activities of the organization,
- Be included in the approved program budget,
- Be given consistent treatment,
- Be in accordance with Generally Accepted Accounting Principles (GAAP),
- Not be included as a cost, or used to meet cost sharing or matching requirements, of any other federally-financed program, and
- Be adequately documented.

iv. Unallowable Costs

Unallowable costs are detailed in federal regulations. Please note, writing of the AmeriCorps grant is an unallowable activity which cannot be charged as an expense, or match, to the AmeriCorps grant. **Grant-writing time should be charged to a cost center unconnected to the AmeriCorps grant. Grant writing activities should be separated on timesheet to document that grant writing was not charged to the AmeriCorps grant.**



- **Staff Fundraising ([45 CFR 2520.60](#))**

AmeriCorps staff members' time, and related expenses, may not be charged to the CNCS (federal) or Grantee share (match) while engaged in organized fundraising. Fundraising activities include, financial campaigns, endowment drives, general solicitation of gifts and bequests, door-to-door solicitations, direct mail, or similar activities for which the sole purpose is raising capital, or obtaining contributions, for the organization. Fundraising expenses may be paid out of the funds raised, or a general fund.

Staff time, and effort, spent on raising matching resources should be incidental to the overall program management, and focus primarily on developing /disseminating information to potential funders on the Serve Wisconsin AmeriCorps Program. Staff can educate and present to funders on objectives, goals, and accomplishments. Efforts towards gaining community support for the AmeriCorps program, such as obtaining medical contributions or assistance at a health fair; donations of building supplies for an AmeriCorps construction project; and coordinating community participation in a serve-a-thon, and service activities, are also allowable. Development officers and fund-raising staff are unallowable expenses.

C. Travel

Procedures shall be established that detail allowable travel for staff, and board members, including an approval process, reimbursement rates and process, and limitations. Serve Wisconsin requires all grantees to budget a minimum of \$2,000 each grant year to support travel for staff to attend a Serve Wisconsin approved training.

D. Member Living Allowance

i. Living Allowances, Other In-Service Benefits and Taxes

Requirements related to member living allowances and benefits are in [45 CFR 2522.240 and 2522.250](#). In addition, the following apply:

a. Living Allowance Distribution

A living allowance is not a wage. Programs must not pay a living allowance on an hourly basis. Programs should pay the living allowance in regular increments, such as weekly or bi-weekly, paying an increased increment only on the basis of increased living expenses, such as food, housing, or transportation. Payments should not fluctuate based on the number of hours served in a time period and must cease when a member concludes a term of service.

If a member serves 1,700 hours, but is permitted to conclude a term of service before the originally agreed upon date, the program may not provide a "lump sum" payment to the member. Similarly, if a member enrolls after the program's start date, the program must provide regular living allowance payments from the member's start date and may not increase the member's living allowance incremental payment, or provide a lump sum to "make up" missed payments.

b. Living Allowance Procedures

- Lump sum payments to members who leave their service term early are unallowable.
- Members who start their term of service after the program's start date are ineligible to receive stipend payments that would have been made between the program's



start date and the member's start date. Refer to Section Distribution, for more information on living allowances.

A member's living allowance should be distributed fairly, equitably, and be the same for the same member position. For example, if a program's start date is September 1, 2019, assuming that the full-time living allowance is \$14,279, each full-time member that is enrolled should be paid \$1,190 a month. If a member is enrolled in September, but leaves the program in July, the member should only receive 11/12 of the living allowance or \$13,089. Even if the member completed all requirements of the program including serving 1700 hours.

Similarly, if a member is enrolled in November and completes in August, the member should only receive 10/12 of the living allowance or \$11,900.

Programs should identify a specific program design(s) (i.e. a specific length for the member term of service) in the program's application. For example, if full-time members are required to serve their terms in 10 months, then the program may pay the full living allowance (e.g., \$14,279) over ten months. If a program's 300-hour members are required to complete their terms in 3 months, then the program may disburse the full living allowance (e.g., \$2,400) over three months. If a member does not complete his/her term of service within the amount of time designated, and the program extends the member's term, then the member must complete his/her service hours with no additional living allowance payments.

Programs may have members of the same position type receive different living allowance amounts, so long as it is determined the members are in different positions. For example, an AmeriCorps program normally enrolls members in September for a half-time position, but had situations where members were starting in January also in a half-time position. Both groups of members were expected to serve until July 31st and their member agreement reflects this term of service. Furthermore, the members in the September to July term are engaged in different/more activities than the members serving January to July, which could mean the members are in different positions. Members in different positions and in the same position type can be paid different living allowance amounts per pay period and ultimately be paid the total budgeted amount of living allowance for their HT position.

If you have questions about determining the amount a member should be paid per pay period, or about creating a living allowance distribution policy please contact your Serve Wisconsin Program Officer.

ii. [Living Allowance FAQ](#)

**E. AmeriCorps Staff Timekeeping
Time & Effort Reporting**

Procedures shall be established to ensure all staff charged as federal share, or match, to the grant have fully executed timesheets (can be electronic) to detail allocation to the grant. Timesheets must reflect actual time spent by program, with one or more pay periods and detail all time worked during that period. Staff allocated 100% to the grant must also have timesheets.

F. Contractual and Consultant Services



Contractual and consultant services, under this grant, should be procured consistent with [45 CFR Part 2543.44](#).

G. Internal Controls

Procedures shall be established to maintain internal cash control records to ensure safeguarding of assets, reliability of financial information and compliance (including procedures for monitoring budget variances, to identify why variances occurred, and to make budgetary adjustments). Grantees must meet 200.303 Internal controls.

The non-Federal entity must:

(a) Establish, and maintain, effective internal control over the Federal award to provide reasonable assurance that the non-Federal entity is managing the Federal award in compliance with Federal statutes, regulations, and the terms and conditions of the Federal award. These internal controls should comply with guidance in “Standards for Internal Control in the Federal Government” issued by the Comptroller General of the United States or the “Internal Control Integrated Framework”, issued by the Committee of Sponsoring Organizations of the Treadway Commission (COSO).

(b) Comply with Federal statutes, regulations, and terms and conditions of the Federal awards.

(c) Evaluate and monitor the non-Federal entity's compliance with statutes, regulations and terms and conditions of Federal awards.

(d) Take prompt action when instances of noncompliance are identified, including noncompliance identified in audit findings.

(e) Take measures to safeguard protected personally identifiable, and other, information the Federal awarding agency, or pass-through entity, designates as sensitive, or the non-Federal entity considers sensitive consistent with applicable Federal, state, local, and tribal laws regarding privacy and obligations of confidentiality.

H. Procurement and Purchasing

Establish procedures detailing requirements for purchasing and procurement of supplies and equipment, including property management, procedures for inventory control, insurance, and disposition of items purchased with federal funds. Equipment inventory must be verified annually by the subgrantee. Procurements must comply with 2 CFR PART 200 SUBPART D – Post Federal Award Requirements, SUBJGRP 31 – Procurement Standards.

I. Record Retention and Destruction

Establish procedures to store, secure, and maintain records for the required time period and ensure records can be obtained, and presented, for review during monitoring or audit.

As noted in grant contracts, programmatic and financial records for programs funded through Serve Wisconsin must be retained for three years beyond the date of final closeout of the Serve Wisconsin Prime application under which programs were funded.

Refer to the Closeout folder in Basecamp to see two documents the [Records Retention Chart](#) and the [Records Retention Schedule](#) to determine whether your program may dispose of records for a particular grant year. Consulting your Serve Wisconsin Program Officer before deleting records to confirm the retention period has passed is encouraged.



J. Other Policies

The following policies are recommended for effective financial grant management. These policies should be available to Serve Wisconsin staff, or its agents, upon request.

- Payroll
- Cash Receipts and Disbursements
- Closeout of Sub-grants/Contracts
- Delegation of Authority Policy
- Cash Drawdown and Reimbursements
- Site Management and Monitoring
- Sub-award Monitoring and Oversight Policy
- Timekeeping Guide or Policy
- Travel Guide or Policy, including Purchase/Travel Credit Card Use
- Procurement Guide or Policy
- Standards for Use of Federal Funds Policy
- Code(s) of Conduct/Ethics applicable to Employment and Purchasing
- Document Retention Policy

6.5 Internal Controls

A. Budget Control Policies

Budget controls assure that parameters of the submitted budget are kept, and adequate resources to implement and complete the program are available. Examples of such policies include:

- Regular monitoring of budget figures by comparing them to actual year-to-date and current period expenditures or outlays.
- Process for recording, and explaining, unexpected or unusual budget variations and determining necessary adjustments.
- A system to utilize organizational monitoring, and reporting, to accurately project unexpended funds and plan for their use (including approved budget modification, if required) or report them to Serve Wisconsin for reallocation.
- A method to ensure budgeted matching requirements are met, and that administrative matching is within allowable rates. (Not applicable for fixed-amount grantees.)
- A process for requesting approvals for budgetary modifications when necessary. (Not applicable for fixed-amount grantees.)
- Ability to accurately track, expend, and report program match as required by federal regulations.
- Ability to obtain approvals, track, and report other federal funds used as match to the AmeriCorps grant.

B. Financial Management Systems

A financial management system, including maximum segregation of financial duties, shall be established, and maintained, to control and account for grant funds. Segregation of duties ensures the use of various accounting functions are handled by different personnel, to minimize the risks of criminal acts, financial oversights, etc. For example, it is recommended that one staff member receives financial donations, while another deposits these donations at the bank. These procedures shall ensure safeguards for assets, and assure that such assets are used solely for authorized purposes.



The grantee must maintain financial management systems that include:

- Standard accounting practices,
- Sufficient internal controls,
- A clear audit trail,
- Written cost allocation procedures (as necessary),
- The ability to distinguish expenditures attributable to this grant from expenditures not attributable to this grant,
- Accounting for each award/grant separately,
- Identification of costs by programmatic year and by budget category, and
- Differentiation between direct and indirect costs or administrative costs.

C. Administrative/Indirect Costs

Administrative costs are general, or centralized, expenses of overall administration of an organization not including program costs. For organizations with an established indirect cost rate for Federal awards, administrative costs are costs included in the organization's indirect cost rate. Such costs are generally identified with the organization's overall operation and are described in 2 CFR Part 200. For organizations without an established indirect cost rate for Federal awards, administrative costs include:

- Accounting, auditing, contracting, budgeting, and general legal services,
- Facility occupancy costs (e.g. rent, utilities, insurance, taxes, maintenance),
- General liability insurance (not directly related to a program),
- Directors and Officer's liability insurance,
- Depreciation on building and equipment,
- Office supplies,
- General and administrative salaries and wages.

Costs that specifically identify a particular final cost objective, such as a Federal award, other internally or externally funded activity, or that can be directly assigned to such activities easily and accurately, may be charged directly. Costs incurred for the same purpose, in like circumstances, must be treated consistently as either direct or indirect (F&A) costs.

Unless otherwise agreed upon by Serve Wisconsin, programs must remain within the maximum CNCS administrative share percentage (as noted in the approved budget) during each reporting period. Administrative percentages are based on actual expenditures; if the entire budget is not expended, then the amount which can be charged to administrative costs is reduced proportionately.

Programs may charge indirect costs to the AmeriCorps grant when they can demonstrate that the indirect cost rate is based on costs which benefit AmeriCorps objectives and provide documentation, such as Federally Approved Indirect Cost Rate Letter or cost allocation plan to support the basis of their claim.

AmeriCorps programs have five options for budgeting indirect costs:

Method	Federal Requirement	Notes
Federally Negotiated Indirect Cost Rate	2 CFR 200.414 (c) Federal Agency Acceptance of Negotiated Indirect Cost Rates	May apply for one-time extension for up to four years. Must be negotiated with from the organization's cognizant agency



State Negotiated Indirect Cost Rate	2 CFR 200.414 (c) Federal Agency Acceptance of Negotiated Indirect Cost Rates	
De minimis rate of 10% of Modified Total Direct Costs (MTDC)	2 CFR 200.414 (f) de minimis rate of 10% of MTDC	<ul style="list-style-type: none"> • May be used indefinitely • Can only use if never had a negotiated indirect cost rate. • Not available to State/Local Gov. with over \$35 million in direct federal funding
Direct Charge	2 CFR 200.413 Direct Costs	<p>Admin & clerical salaries should normally be treated as indirect (F&A) costs. <u>Direct charging of these costs may be appropriate only if all of the following conditions are met:</u></p> <p>services are integral to a project or activity; Individuals involved can be specifically identified with the project or activity; costs are explicitly included in budget or have the prior written approval of awarding agency; and The costs are not also recovered as indirect costs. (2 CFR 200.413(c))</p>
5% Federal Share/10% Match Administrative Costs	45 CFR 2510.20 and 2521.95 Administrative Costs	See Application Instructions from the most recent RFP.

i. Federally Approved Indirect Cost Rate (FAICR)

A federally approved indirect cost rate (FAICR) is an administrative rate negotiated with the cognizant federal agency (the federal agency your organization receives the majority of its federal funds). To obtain an indirect cost rate, an indirect cost proposal must be submitted to the cognizant agency and negotiate an indirect cost agreement. Indirect costs may only be charged when there is a Federally Approved Indirect Cost Rate in effect. An AmeriCorps program with a FAICR may charge up to the maximum federal share allowed in the grant application instructions. In addition, they may show up to the remaining FAICR as grantee share in the budget. Organizations with a FAICR must submit a copy of the FAICR letter with their AmeriCorps grant application. The FAICR letter serves as documentation for the administrative costs section of the AmeriCorps budget.

ii. CNCS Fixed 5/10% Percentage Method

Organizations without a federally approved indirect cost rate may elect to utilize the Fixed Percentage method. Under this method, programs may charge up to the maximum federal share allowed in the AmeriCorps grant application instructions. Additionally, charges may show up to 10% of the total (federal + grantee share) of budget sections I and II as matching resources, in the grantee share column of section III of the budget.

iii. De minimis rate of 10% of Modified Total Direct Costs



Any non-Federal entity that has never received a negotiated indirect cost rate (except for non-Federal entities described in 2 C.F.R Appendix VII to Part 200—States and Local Government and Indian Tribe Indirect Cost Proposals, paragraph D.1.b) may elect to charge a de minimis rate of 10% of modified total direct costs (MTDC) which may be used indefinitely. (See [2 CFR 200.414\(f\)](#))

D. Direct and Indirect Costs

The total cost of a grant is comprised of the allowable direct cost incident to its performance, plus its allocable portion of allowable indirect costs, less applicable credits. There is no universal rule for classifying certain costs as either direct or indirect under every accounting system. A cost may be direct with respect to some specific service or function, but indirect with respect to the grant or other ultimate cost objective. It is essential, therefore, that each item of cost for the AmeriCorps Program be treated consistently as either a direct or an indirect cost. Specific guidelines for determining direct and indirect costs allowable under grants are provided below.

i. Charging of Direct Costs

Direct costs are specific expenses related to the operations of a specific project. Direct costs are those costs that are readily assignable to the AmeriCorps Program. Direct costs may be charged as a total cost of a specific service to the AmeriCorps Program or may be a shared cost. Typical direct costs chargeable to grants include:

- Allowable direct expenses for members (living allowance, FICA, health care, worker's compensation)
- Costs for staff who train, place, or supervise members
- Evaluations of programs, or other services, furnished specifically for the grant by other agencies, provided such charges are consistent with criteria outlined in these principles
- Supplies and facilities costs (including member gear with the AmeriCorps logo)
- Travel
- Training

ii. Charging of Indirect Costs

Indirect costs are general expenses related to overall administration of an organization receiving CNCS funds incurred for common/joint objectives that cannot be readily identifiable with a particular project or cost objective. See Section C. Administrative/Indirect Costs for more information on indirect costs.

A cost may not be allocated to an award as an indirect cost if any other cost incurred for the same purpose, in like circumstances, has been assigned to an award as a direct cost. For example, if you charge your accountant's time to the AmeriCorps grant as a direct cost, you cannot charge their time as an indirect cost to your other programs/grants or awards.

6.6 Documenting Expenses

A. General Federal Requirements

All costs reported on the financial report and Periodic Expense Report (PER) must be necessary for the achievement of the AmeriCorps goals, and activities, as described within the grant; and have adequate source documentation on file to support those costs, and the costs must be traceable to the agency's books of account. As required by the Federal Regulations and 2 CFR 200, AmeriCorps grant funds must be



segregated from other agency expenses and tracked by grant year in the financial system. Separation by agency fiscal year or calendar year does not satisfy the AmeriCorps funding requirements.

All accounting records (including match and in-kind contributions) shall be supported with properly authorized source documentation, such as time and attendance reports, canceled checks, invoices, paid bills, or grants and sub grants awarded. Records shall be maintained adequately identifying the source and application of funds for grant supported activities. Records shall be maintained that trace funds to a level of expenditure adequate to demonstrate that funds have not been used in violation of the restriction imposed by the grant. Further, financial information shall be maintained to show the relation of expenditures, or matching resources, to performance or productivity. Serve Wisconsin requires that the program certify, in writing, that matching funds for these costs are from non-federal or approved federal sources annually. The program is responsible for obtaining a similar written certification from their sites, or financial contributors. Program match and Federal Funds used as Match must be reported on the Match Report & AFR at regular reporting intervals. See specific information on Federal Funds used as match in section 6.8. Budgeting & Reporting.

B. In-Kind Resources

Organizations are required to maintain adequate documentation to support amounts claimed as match. The same documentation is required for both CNCS share and grantee share. Documentation must meet the same standards as other expenditures within the organization. In-kind donations must be valued based on fair market price (the price the item would sell for on the open market or what it would cost to obtain similar goods or services). Donors must provide the donation's value and the organization should ensure that the value is reasonable.

i. Basis for Determining the Valuation

For personal service, material, equipment, buildings, and land shall be documented. Financial records related to in-kind resources should be maintained at the same level as the cash contributions. If the books of account do not allow for tracking of in-kind donations, the program should utilize a separate spreadsheet to track in-kind donations monthly for reporting in the program's Periodic Expense Reports, AFR, and financial review.

ii. Documentation of In-kind Resources

Must enable the donor to attest to the value of the contribution. The following items should be contained on the in-kind donation form:

- Name and signature of donor
- Date and location of donation
- Detailed description of item or service
- Estimated value of contribution, how value was determined, who made the determination
- Whether the contribution was obtained with Federal funds

C. Supporting Documentation

The following supporting documentation must be made available to support expenses on the associated Periodic Expense Report (PER) upon request by Serve WI and should be reflected on your General Ledger.

Include General Ledger for all of the following:

- i. **Personnel:** Staff Payroll Ledger (if different than GL), staff timesheets (charged to grant/cash match or in kind, that reports 100% of staff time).



- ii. **Fringe Benefits:** Subsidiary accounts with fringe include, invoices for payment records (proof of remitted payroll earnings for unemployment, social security, health insurance premiums, workers compensation, retirement contributions, unemployment insurance, and any other employee withholding).
- iii. **Travel:** Staff and Member travel expense reimbursement report, purchasing card payment, invoices supporting travel transactions (meal, lodging and transportation receipts if applicable, agendas, authorization approvals, budgeted, travel policy), description of program purpose.
- iv. **Equipment:** Documented approval from Program Officer if \$5,000 or more. Documentation of adherence to procurement guidelines. Invoices, purchase approvals, purchasing statements, packing slips.
- v. **Supplies:** Invoices, purchase approvals, purchasing statements and invoices/receipts, packing slips. documented program purpose/approval.
- vi. **Consultants:** Memorandum of Understanding (MOU)/contract describing purchase. Explanation of provided deliverables. Documented payment approval.
- vii. **Training:** Training policy, description of what's being paid for, invoice, agency approval (list of attendees), agendas/outlines, payment mechanism (PO, credit, etc.), evaluation of effectiveness, associated expenditures (meals, lodging, transportation costs).
- viii. **Evaluation:** Contract/MOU of what is being provided, authorization, documentation that procurement guidelines are met.
- ix. **Other Ops:** Invoices, approvals to pay, description of program purpose (similar to supplies).
- x. **Living Allowances:** Payroll ledger, OnCorps time sheets, member activity status (from payment record -i.e. begin and end dates), any alternative service descriptions.
- xi. **Member Support:** same as B. (Fringe Benefits).
- xii. **Admin/Indirect Cost:** Cost allocation plan, support/description for calculation for reported expenses, description of cost centers (allocation methodology), corresponds with approved budget line.

6.7 Program Match ([45 CFR 2521.35-45 CFR 2521.90](#) and [CNCS Single Match FAQ](#))

Cost reimbursement grant programs must meet the matching requirements outlined in the approved budget (note: there is no match requirement for fixed amount grant programs (Education Award Only and Full-Time & Professional Corps Fixed Amount)).

The following chart details minimum matching requirements based on the grant year cycle. While the AmeriCorps Regulations refer to match requirements in specific budget categories, in recent years the CNCS appropriations legislation has dictated that programs meet only an overall matching requirement, known as “single match.” Programs should reference the [NOFO and Application Instructions](#) used when preparing their application for details on applicable matching requirements. Programs should refer to eGrants to access the years of program operation and verify matching obligations.

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10 (+)
Minimum Overall Share	24%	24%	24%	26%	30%	34%	38%	42%	46%	50%

A. Matching Levels



i. Budgeted Match

The grant contract requires that programs meet the budgeted matching level. If a program anticipates it will be unable to meet the matching level proposed, a budget modification should be requested from Serve Wisconsin no later than May 1st for the current program year. Concerns regarding matching requirements will be shared with the Serve Wisconsin Board in consideration for continued program funding.

ii. Statutory/Required Match

If a program fails to meet the matching requirements, or administrative costs restrictions listed below, the Commission will notify the Program Director of the situation, in writing, and request that the situation be rectified within the current or next reporting period. If match issues persist, the commission may notify other staff members, including the financial officer and/or authorized representative of the agency. The Commission may suspend payment of the reimbursement request(s) until the situation is corrected and reported appropriately in OnCorps. As merited, the issue may be brought to the attention of the Serve Wisconsin Board and/or CNCS.

B. Matching Requirements ([45 CFR 2543.23](#)) Cost Sharing or Matching

All contributions, including cash and third party in-kind, shall be accepted as part of the program's cost sharing or matching, when such contributions meet the following criteria:

- i. Are verifiable from the program's records.
- ii. Are not included as contributions for any other federally assisted project or program.
- iii. Are necessary, and reasonable, for proper and efficient accomplishment of project or program objectives.
- iv. Are allowable under the applicable cost principles.
- v. Are not paid by the Federal Government under another award, except when authorized by Federal statute to be used for cost sharing or matching.
- vi. Are provided for in the approved budget.
- vii. Conform to other Terms and Conditions of the Regulations and Uniform Guidance, as applicable.
- viii. Unrecovered indirect costs may be included as part of cost sharing or matching, only with the prior approval of the Federal awarding agency.
- ix. Volunteer services furnished by professional and technical personnel, consultants, and other skilled labor may be counted as cost sharing or matching, if the service is an integral and necessary part of an approved project or program. Rates for volunteer services shall be consistent with those paid for similar work in the program's organization. In instances where the required skills are not found in the organization, rates shall be consistent with those paid for similar work in the labor market in which the program competes. In either case, paid fringe benefits may be included in the valuation, so long as they are reasonable, allowable, and allocable.
- x. When an employer, other than the program, furnishes services of an employee, these services shall be valued at the employee's regular rate of pay (plus an amount of fringe benefits that are reasonable, allowable, and allocable, but exclusive of overhead costs), provided these services are of the same skill for which the employee is normally paid.
- xi. Donated supplies may include items such as office, laboratory, workshop, and classroom supplies, as well as expendable equipment. Value assessed to donated supplies included in the cost sharing or matching share shall be reasonable and shall not exceed the fair market value of the property at the time of the donation.



- xii. Values for program contributions of services and property shall be established in accordance with the applicable cost principles. If a Federal awarding agency authorizes programs to donate buildings, or land, for construction/facilities acquisition projects, or long-term use, the value of the donated property for cost sharing or matching shall be the lesser of:
 - a. The certified value of the property's remaining life recorded in the program's accounting records at the time of donation, or
 - b. The current fair market value. However, when there is sufficient justification, the Federal awarding agency may approve the use of the current fair market value of the donated property, even if it exceeds the certified value at the time of donation to the project.
- xiii. The method for determining cost sharing or matching for donated equipment, buildings and land for which title passes to the program may differ according to the purpose of the award:
 - a. If the award's purpose is to assist the program in the acquisition of equipment, buildings, or land, the total value of the donated property may be claimed as cost sharing or matching, or
 - b. If the award's purpose is to support activities requiring the use of equipment, buildings, or land, normally only depreciation, or use charges, for equipment and buildings may be made. However, the full value of equipment or other capital assets and fair rental charges for land may be allowed, provided that the Federal awarding agency has approved the charges.
- xiv. The value of donated property shall be determined in accordance with the accounting policies of the program, with the following qualifications.
 - a. The value of donated land and buildings shall not exceed its fair market value at the time of donation to the program, as established by an independent appraiser (e.g., certified real property appraiser or General Services Administration representative) and certified by a responsible official of the program.
 - b. The value of donated equipment shall not exceed the fair market value of equipment of the same age and condition at the time of donation.
 - c. The value of donated space shall not exceed the fair rental value of comparable space as established by an independent appraisal of comparable space, and facilities, in a privately-owned building in the same locality.
 - d. The value of loaned equipment shall not exceed its fair rental value.

C. Using Other Federal Funds as Match

In limited cases, federal funds may be used as match on an AmeriCorps grant. In 2011, the Corporation compiled written acknowledgements from other Federal agencies that their grant funds can be used to match specific Corporation grants. This document can be found at <https://www.nationalservice.gov/sites/default/files/upload/Memo%20and%20Match%20Authorization%20letter%20to%20AmeriCorps%20grants.pdf>. This is not meant to be an all-inclusive list of other federal funds that may be used as match.

D. Program Income (2 CFR 200.307, Terms and Conditions)

Income, including fees for service, earned as a direct result of award-funded program activities during the award period, must be retained by the grant award recipient and used to finance the award's non-CNCS share.

Program income earned in excess of the amount needed to finance the recipient share must follow the appropriate requirements of 2 CFR Part 200 and be deducted from total claimed costs. Recipients that earn excess income must specify the amount of the excess in the comment box on the financial report.



When using assistance under this award, the recipient may not enter into a contract, or accept fees, for service performed by members when: (1) The service benefits a for-profit entity, (2) The service falls within the other prohibited activities set forth in these award provisions, or (3) The service violates the provisions of 42 U.S.C. 2637 – Nonduplication and Nondisplacement.

For Full-Cost, and Professional Corps Fixed Amount awards, the recipient must notify Serve Wisconsin if it earns program income in excess of the amounts needed to cover all expenditures under the award.

6.8 Budgeting & Reporting

A. Grant Period (Terms and Conditions)

i. Competitively Funded Programs

CNCS competitive grants cover a three-year project period, containing three budget periods (one year each). Continued funding is contingent upon satisfactory performance and the availability of funds. Therefore, competitive programs will submit a continuation application for each budget period contained within the project period as described in the current year's Application Instructions and NOFO/RFP. At the beginning of each new three-year budget period, a full application is required.

ii. Formula Funded Programs

Programs funded by state formula grants are awarded on a one-year basis. Formula funded programs have the option to apply for a formula continuation grant. Continued funding is based upon the grant application, program performance, program management, and availability of funds. All formula granted programs are expected to demonstrate continuous improvement in an effort to obtain competitive funding.

B. Budgeting

An effective budget is a planning tool or guide for the financial support of the AmeriCorps grant, and must be realistic, consistent, and flexible. Budgeting is not an annual process, but rather an ongoing review of actual costs. This process allows for proactive action to be taken to address shortfalls and unanticipated revenues.

C. Budget Modification

Before, and during, the program year, you are able to modify aspects of your program. Some modifications require notification to Serve Wisconsin staff, others require approval from Serve Wisconsin and the Corporation for National and Community Service. Information on Program Modification are found in your program's contract supporting documents.

Refer to Budget Modification Guidelines, and Sample Budget Modification Request Spreadsheet, for budget modification information and steps. A request letter (can be an email), submitted by an authorized program representative, must be received by your Serve Wisconsin program officer before formal consideration will be given. Budget modification requests can be submitted to Serve Wisconsin up to May 1st of that program year.

i. Budget Modifications

Grantees must obtain prior written approval before amending the approved budget in any of the following ways:



- Specific Costs Requiring Prior Approval Before Incurrence (2 CFR part 220, 2 CFR part 225, or 2 CFR part 230). For certain cost items, regulations require approval by the awarding agency for the cost to be allowable. Examples of such costs include overtime pay, rearrangement and alteration costs, and pre-award costs.
- Purchases of equipment over \$5,000 using Grant funds, unless specified in the approved application and budget.
- Adding expenses to one, or more, major budget lines that were budgeted, and approved, for \$0 of expenditure. The major budget lines are: I.A. Personnel Expenses; I.B. Personnel Fringe; I.C. Travel; I.D. Equipment; I.E. Supplies; I.F. Contractual & Consultant Services; I.G. Training; I.H. Evaluation; I.I. Other Program Operating Costs; II.A. Living Allowance; II.B. Member Support Costs; and III Administrative/Indirect Costs.
- Changes to cumulative and/or aggregate budget line items that amount to 10 percent, or more, of the total program budget must be priorly approved, in writing, by Serve Wisconsin. Depending on circumstances, CNCS approval may be required. Grantees may transfer funds among approved direct cost categories when the cumulative amount of such transfers does not exceed 10 percent of the total program budget.

For example, Test Program’s total program budget is \$500,000, thus 10 percent of that is \$50,000. Test Program had budgeted \$10,000 for other operating costs and \$5,000 for supplies. The program has grossly overspent in each line item and reports \$30,000 and \$25,000 for other operating costs and supplies, respectively. No budget modification is required as the transfers do not exceed 10 percent of the total budget. Below is a modified Periodic Expense Report that needs a budget modification because the changes amount to 10 percent or more of the total program budget.

In situations not included above, as needing prior approval, it is unnecessary to request a budget modification. When the Grantee has a CNCS or Grantee Share balance as a result of unfilled or vacated positions, as long as the Grantee continues to match at the budgeted percentage.

Below is a modified Periodic Expense Report in need of a budget modification because the changes amount to 10 percent, or more, of the total program budget. This example is included to emphasize how changes may be tallied to determine if modification is needed.

Terminology: A category is one of three parts of the AmeriCorps budget. Each category/section is labeled with a Roman numeral, I-III. A line item is a budget item within each category/section. For example, Category/Section I is Program Operating Costs, and A. Personnel Expenses is a line item within that category.

Line item changes of major line items (A, B, C.3, D, E, F, G.3, H, I, K.7, L.5) cannot exceed 10% of their cumulative budget. When calculating if a budget modification is needed, look at only these major line item’s total overages. The current expenditures column has been removed from this PER for space purposes.

Periodic Expense Report

Budget Item	Budget Total				Year-To-Date				Budget versus YTD Actual			
	CNCS	Grantee Cash	Grantee In-kind	Total	CNCS	Grantee Cash	Grantee In-kind	Total	CNCS	Grantee Cash	Grantee In-kind	Total
Program Operating Costs												
A Personnel Exp	\$77,040.00	\$93,403.00	\$17,000.00	\$187,443.00	\$76,013.50	\$96,845.69	\$15,529.04	\$188,388.23	\$1,026.50	(\$3,442.69)	\$1,470.96	(\$945.23)
B Fringe Benefits	\$22,923.00	\$27,790.00	\$5,425.00	\$56,138.00	\$17,038.27	\$20,083.38	\$5,615.46	\$42,737.11	\$5,884.73	\$7,706.62	(\$190.46)	\$13,400.89
C Travel												
C.1 Staff Travel	\$1,311.00	\$1,589.00	\$0.00	\$2,900.00	\$1,888.58	\$1,950.35	\$0.00	\$3,838.93	(\$577.58)	(\$361.35)	\$0.00	(\$938.93)
C.2 Member Travel	\$2,918.00	\$3,537.00	\$0.00	\$6,455.00	\$2,766.48	\$3,352.68	\$0.00	\$6,119.16	\$151.52	\$184.32	\$0.00	\$335.84
C.3 Travel Subtotal	\$4,229.00	\$5,126.00	\$0.00	\$9,355.00	\$4,655.06	\$5,303.03	\$0.00	\$9,958.09	(\$426.06)	(\$177.03)	\$0.00	(\$603.09)
D Equipment	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
E Supplies	\$4,639.00	\$5,621.00	\$200.00	\$10,460.00	\$17,657.76	\$11,582.15	\$9,950.00	\$39,189.91	(\$13,018.76)	(\$5,961.15)	(\$9,750.00)	(\$28,729.91)
F Consultants	\$68.00	\$82.00	\$0.00	\$150.00	\$4,523.52	\$3,646.48	\$0.00	\$8,170.00	(\$4,455.52)	(\$3,564.48)	\$0.00	(\$8,020.00)

To determine if a program needs a budget modification, we then see if these total line item overages are greater than or equal to ten percent (10%) of the total budget:

	AmeriCorps Funds	Grantee Share
1. Grant Amount (linked to budget above)	\$258,000.00	\$337,832.00
2. Expenditures to Date (Before this report)	\$220,620.68	\$333,399.69
3. Grant Balance Available (line 1 less line 2)	\$37,379.32	\$4,432.31
4. Current Period Expenditures (linked above)	\$31,186.65	(\$3,657.74)
5. Grant Balance Remaining	\$6,192.67	\$8,090.05
6. Amount of This Request (current expenses)	\$31,186.65	(\$3,657.74)
Final PER?	<input checked="" type="radio"/> Yes <input type="radio"/> No	—

CNCS Budget	\$258,000.00
10% Budget	\$59,583.20
CNCS Admin <= 5.26%	
Budget	5.26% (OK)
YTD Actual	5.26% (OK)
Grantee Share Admin (<= 10% applies only to CNCS Fixed %)	
Budget	4.00%
YTD Actual	4.00% (OK)
Overall Match >= 57%	
Budget	56.7% (NO)
YTD Actual	56.7% (NO)

In this example, the total major line item changes equal \$61,854.09, and 10% of the budget is \$59,583.20 as shown above. Because this program is over 10% of their budget in changes, they need a budget modification.

ii. Modifications to Grantee Share – Minimum Aggregate Match

If Grantees are unable to meet their budgeted aggregate match, they may submit a budget modification request no later than May 1st of that program year. If necessary, a budget modification request will be forwarded to CNCS for review/approval.

Grantees will receive correspondence from Serve Wisconsin staff indicating if budget modification is approved. Grantees shall not utilize a modified budget until written notification from Serve Wisconsin is received. OnCorps includes an online budget modification request form. If a budget modification is approved, Serve Wisconsin will notify the Grantee to submit the budget modification request in OnCorps.

D. Financial Reporting

The following is to be used in conjunction with the grant agreement and is intended as a guideline. Reporting programmatic progress, and challenges, mutually benefits both grantees and Serve Wisconsin; it helps to assess program goals, ensure members have access to the full benefits of their AmeriCorps participation, provides justification of expenses, allows for reimbursement, and keeps Serve Wisconsin aware of progress of programs. Regular reporting is required within the Serve Wisconsin grant award. Failure to report in a timely manner can result in punitive action, up to and including, revoking of the grant award. Timeliness and accuracy of reporting will be considered by the Serve Wisconsin Board for future funding recommendations.

AmeriCorps grantees are required to report expenditures and matching resources on a monthly or quarterly basis to Serve Wisconsin. **Reporting to Serve Wisconsin must be:**

- By grant year (not agency fiscal year, state/federal fiscal year, or calendar year).



- Based on actual expenditures, not budgeted, or estimated amounts.
- Directly from the agency’s general ledger/books of account.
 - If in-kind matching resources are tracked separately from the general ledger, they must be recorded in a separate spreadsheet. A formal written explanatory policy, and supporting procedures, must be established.
- Accrual basis is the preferred reporting method. Accrual is the accounting basis that brings items to account as they are earned or incurred (not as cash received or paid) and includes them, in financial statements, in the related accounting period. If records are not maintained on an accrual basis, accrual data for reports may be developed based on analysis of the documentation on hand. In such cases, the accounting process must provide sufficient information to compile data to satisfy the accrued expenditure reporting requirements, and to demonstrate the link between the accrual reports and actual books of account. Such documentation shall be retained for audit purposes.
- Done through OnCorps or Approved Fixed Amount Invoice.

The following financial reports will be collected from grantees. Reporting requirements may vary by grant type. Specific reporting procedures and screen shots from OnCorps (the reporting system) are included on the Resources page in the OnCorps system.

i. Reimbursable Grantees

Reimbursable Grantees will primarily use OnCorps to submit financial information. Programs can choose to submit Periodic Expense Reports (PER) monthly or quarterly. Aggregate Financial Reports (AFRs) and Match Reports are due quarterly, or as specified in your grant agreement. The estimated unexpended funds report (reports anticipated unexpended funds), Program Closeout, and electronically providing a copy of your Annual Audit Report occurs at least once a year. A full Fiscal Desk Review will occur when required but no less than every three years.

Advance Payments.

The Grantee is eligible to receive an advance payment at the beginning of the contract year of up to one-sixth of the grant amount. If a Grantee requests and receives an advance payment, the Grantee will be required to “pay back” at least one-half of the advance payment by the end of the second quarter of the program year. The Grantee will be required to “pay back” the remainder of the advance payment by the end of the Grantee’s original contract year. The Grantee shall keep advance payment funds in an interest-bearing account; any interest over \$500.00 shall be returned to Serve Wisconsin. If the advance payment policy creates a financial hardship for the program, contact your Serve Wisconsin program officer.

Financial Reporting Requirements – Reimbursable Grantees

Fixed Amount grants programs (Education Award Only and Full-Time Fixed & Professional Corps Fixed, do not complete the following forms).

- **Periodic Expense Reports form (PER)** to request reimbursements
- **Aggregate Financial Report (AFR)**** Provides aggregate funding information and includes:
 - Federal Share
 - Grantee Share
- **Match Report****

Grantees are required to report amounts, and sources, of match funding, including federal funds, other than those provided by the Corporation, used to carry out their programs. For example, if a program receives host-site contributions, it must detail in the Program Match Report what amount of those host-site contributions is being claimed in the PER.



Match includes other federal funds expended by grantees and operating sites. This requirement should be included in site agreements. CNCS has obtained written authorization from the following federal agencies detailing the terms under which their funds can be used as match:

- Dept. of the Interior (conservation corps and similar programs)
- Admin. On Aging (use of Title III E funds to support similar activities)
- Dept. of Education
 - Title I, part A Elementary & Secondary Education Act
 - School Improvement Grants
 - Race to the Top
 - I3 Awards
 - High School Graduation Initiative
 - Full Service Community Schools
 - Promise Neighborhoods
 - 21st Century Community Learning Centers
- **OnCorps AFR Instructions for Reporting Whether Other Federal Funds Were Used as Match – Once each program year, in the AFR for the period ending September 30th (at the end of the program year)**

Enter one of the following statements, 1 or 2, into the Remarks field as appropriate:

1. No federal funds other than from the Corporation were used to carry out the program(s) funded under this grant during the preceding 12 months (October 1 through September 30).
 - If you entered statement A, you have completed your reporting regarding other federal funds.

OR

2. Sources, and amounts, of federal funds, other than funds from the Corporation used to carry out the program(s) funded under this grant during the preceding 12 months (October 1 through September 30) are as follows:
 - If you entered statement B, enter the data described below using one line for each source of other federal funds. Use a semicolon to separate each data element as shown below, without any spaces between data elements and the semicolons. Enter a hard-return break to create a blank line.
 - Enter the eGrants subaward number
 - The name of the other federal agency (without abbreviation)
 - The other federal agency grant or contract number
 - The Catalogue of Federal Domestic Assistance (CFDA) number or “N/A” if a contract
 - The cumulative amount expended towards the AmeriCorps program from that source in whole dollars, rounded to the nearest dollar.



A sample report follows:

“Sources and amounts of federal funds other than funds from the Corporation used to carry out the program(s) funded under this grant during the preceding 12 months (October 1 through September 30) are as follows:

12ACHWI001000; Department of Health and Human Services; Grant ABCDEF; CFDA 88.888; \$50,567

12ACHWI001000; Department of Labor; Grant 234567; CFDA 99.999; \$25,333

12ACHWI001000; Department of Agriculture; Contract 123456; N/A; \$1,000

12ACHWI001000; Department of Education; Grant XYZ123; CFDA 11.111; \$90,199”

- Estimated unexpended funds report (reports anticipated unexpended funds) – See Section 9
- Fiscal Review when required – See Section 6.10
- Annual Audit Report - See Section 6.11
- Closeout Report – See Section 6.12

**** For a step-by-step guide on AFR and Match Reporting please refer to the Serve Wisconsin Subgrantees OnCorps Instructions for Financial Reporting**

ii. Professional Corps Full-Time Fixed Amount, Full-Time Fixed Amount, and Education Award Only Grantees

Professional Corps Fixed Amount, Full-Time Fixed Amount, and Education Award Only programs are not required to track or report expenditures. However, they will be required to request payment based on enrolled members and/or hours served.

Fixed Amount, and Education Award Only grantees, are not required to report program match. However, they are expected to follow generally accepted accounting principles to account for all revenues, including grant-related program income.

Financial Reporting Requirements- Fixed Amount Grantees

- **Fixed Amount Program Invoice**
Fixed Amount grants allow for a fixed amount per individual member service year (MSY) that is enrolled in a national service position. The advantage to fixed amount grants is less financial reporting; however, fixed amount payments are based solely on the number of approved hours completed by enrolled members during a specified time period. The program will not receive all funds if a member does not complete successfully, or if the program does not enroll all of the awarded positions.

Each year fixed amount grantees will receive an invoice spreadsheet from their Serve Wisconsin Program Officer along with instructions detailing how the invoice is to be completed. Please refer to those documents. Invoice instructions are also stored on Basecamp.



- **Advance Payment**
Full-Time Fixed Amount, and Professional Corps Fixed Amount programs, may draw up to 20% of their grant award at the beginning of the program year to cover initial costs associated with recruiting, selecting, and training members. After that, programs may draw regular payments not to exceed the number of member hours served. These advance payments are then repaid each invoice period. The deadline for submitting advance payment requests will be specified in annual grant agreement documents.
- **Annual Audit Report** (See Section 6.11)
- **Closeout Report** (See Section 6.12)

iii. Financial Reporting Requirements- Education Award Only Grantees (EAP)

For Education Award programs (EAP), the fixed federal assistance amount of the grant is based on the approved and awarded number of full-time (MSYs) members specified in the award. For EAPs, the final amount of grant funds that the grantee may request is dependent upon the number of members that the subgrantee has enrolled. Once members have been enrolled in eGrants, programs may submit an invoice requesting the funds associated with each enrolled member.

E. Serve Wisconsin Financial Reporting Schedule

Staff looking for a frequently updated calendar should go to Basecamp. A generalized schedule is provided below:

Advance Payment Requests

Advance Payment Requests (if eligible and desired)²

Friday, September 18, 2020

Aggregate Financial Reports (AFRs) And Match Reports³

Type of Report & Reporting Period

Match Report: Agreement Start Date (varies per program) – December 31, 2020
 Match Report: January 1 – March 31, 2021
 Match Report: April 1 – June 30, 2021
 Match Report: July 1 – September 30, 2021
 AFR: Agreement Start Date – September 30, 2021
 AFR & Match Report: October 1 – December 31, 2021 (if program has an extension)

Due Dates

Wednesday, January 20, 2021
 Tuesday, April 20, 2021
 Tuesday, July 20, 2021
 Wednesday, October 20, 2021
 Wednesday, October 20, 2021
 Thursday, January 20, 2022

Budget Modification Requests

Budget Modification Requests

Saturday, May 1, 2021

² Education Award Programs, Professional Corps Fixed Amount Programs, and State Agencies are not eligible for Advance Payment Requests.

³ Education Award Programs, Professional Corps Fixed Amount Programs, and Full-Time Fixed Amount Programs are not required to submit Aggregate Financial Reports.



Important Reminders

- Reimbursement requests for approved expenses incurred for AmeriCorps member special events or meetings must be submitted no later than **60 days** after the event has occurred.
- Unless otherwise noted, all items should be submitted to your Program Officer by the above dates.
- Budgets shall be submitted in OnCorps within 30 days of the program year start date.

F. Budgeting, Reporting and Budget Modifications

Grant expenditures should be “ordinary and necessary” as well as detailed within the budget narrative and/or narrative portions of the AmeriCorps grant application. It is recommended that programs communicate with their assigned Program Officer about budgetary changes, or when they determine that actual expenditures differ largely from budgeted amounts. The grantee must request prior approval from Serve Wisconsin and CNCS, including but not limited to, the following reasons:

- **Items not included in budget**

Items not described, or accounted for, within the budget require approval from the Serve Wisconsin. For example, if the program did not budget for the purchase of a piece of equipment, but determines a need for such equipment and wants to purchase using AmeriCorps funds. Sub-grants, or contracts, not included in approved application and budget (2 CFR 200.331-332).

- **Budgetary changes related to changes in the scope or goals of the project**

- **The need for additional federal funding**

- **Transfer from indirect to direct costs**

The transfer of amounts budgeted for indirect costs to absorb increases in direct costs, or vice versa.

- **Costs requiring prior approval**

- Under 2 CFR Part 200, Subpart E. For certain cost items, the cost principles require approval of the awarding agency for the cost to be allowable. Examples of such costs are overtime pay, rearrangement and alteration costs, and pre-award costs.

- **Transfer or subcontract of work under an award**

The transfer, sub-award or contracting out of any work under an award; (This does not apply to purchase of supplies, material, equipment, or general support services.)

- i. **Exceptions to Policies**

Exceptions must be requested, in writing, to the Serve Wisconsin Program Officer. The Commission may withhold payments, or take other actions as outlined in the Grant Agreement, if program reports are late, inaccurate or out-of-compliance (i.e. matching requirements not met).

6.9 Estimated Unexpended Funds Report

Prior to issuing annual Competitive and Formula grant awards, CNCS sends Serve Wisconsin requests for estimates of unexpended funds for each of Serve Wisconsin’s Prime AmeriCorps program grants. CNCS uses this information to determine if Serve Wisconsin has any anticipated unexpended funds to be returned to CNCS.

To obtain necessary information to report to CNCS, Program Officers will send an email to each of the programs, under a particular Prime, to ask for an estimate of unexpended funds for the current program year. Programs should report as accurately as possible once this email is received. Each program reporting anticipated unexpended funds will be held to the amount reported to Serve Wisconsin.



6.10 Fiscal Review – Not Applicable to Fixed Amount Programs

Serve Wisconsin will annually conduct financial reviews for programs with reimbursable budgets. These reviews will be handled by Serve Wisconsin's fiscal team.

6.11 Audit Requirements

A. Single Audit Requirements

As applicable, Grantees shall have a certified annual audit performed in accordance with standards required by 2 CFR 200 – Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, Subpart F – Audit Requirements. The audit must be prepared using Generally Accepted Government Auditing Standards (GAGAS). The Government Accountability Office (GAO) presents professional standards in the 2018 revision of Government Auditing Standards (GAS) (known as the Yellow Book), These standards are commonly referred to as generally accepted government auditing standards (GAGAS). The 2018 revision contains major changes and supersedes the 2011 revision.

The auditor will attest to the financial statements, and whether they comply with Generally Accepted Accounting Principles (GAAP). The audit shall include funds passed through the Board and expended by the Grantee. Records of the Grantee, subgrantee, if any, and contractors relating to this Agreement shall be available for review or audit upon request by the Board or the Board's duly authorized representatives.

For more information on State Single Audit Requirements (SSAG), please [click here](#). Once that page is loaded you will click on link for most recent year, then scroll down to SSAG section for Dept. of Administration Division of Executive Budget and Finance guidance. The State Single Audit Guidelines implement the federal audit requirements in the Federal CFR Part 200 Subpart F, "Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards" for certain state programs and federal programs passed through state agencies.

The Guidelines consist of two parts: the main document, which describes the states single audit policy in general terms, and the department-specific appendices, which detail audit requirements for programs from the respective departments. NOTICE: Some documents have been brought forward from prior years, so even if they appear old, they are the most current material available records of the Grantee, subgrantee, if any, and contractors relating to this Agreement shall be available for review, or audit, upon request by the Board, or the Board's duly authorized representatives. Additional copies of audits may be requested during the grant application required along with the submission of a grant application.

6.12 Grant Closeout

Upon the completion of each program year, Serve Wisconsin creates a Program Year End File for each program. Each program will be notified when the annual Serve Wisconsin Closeout Form is due to be submitted in OnCorps. Serve Wisconsin Program Officers complete a checklist to ensure the following for each program:

- Final PER & Final AFR (OnCorps) completed and approved. Please refer to the OnCorps Instructions for Quarterly Financial Reporting document for a statement that must be included in your final AFR
- All AmeriCorps members exited from the program in My AmeriCorps Portal and OnCorps
- Final Progress Report completed, including "Final Results" for each performance measure for the entire program year, except for National PMs that have a target measured up to one year after members finish the program.

Final Invoice must meet the following requirements:



- CNCS Share of Administrative costs should be 5.26% or less
- Grantee Share of Administrative costs should be 10% or less or if organization as a federal indirect cost rate, administrative costs should be equal to or less than the indirect cost rate
- Total match should be equal to or greater than commitment

Statement of Advance Interest

- If the program received an advance, the program has submitted a statement regarding interest earned over the period of the grant and a check to DOA for any amount over \$250.00 (retain a copy of the check, if applicable).

Sources

- CNCS Resources Website (<https://www.nationalservice.gov/resources>)
- 2 CFR 200 - Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards.
- Electronic Code of Federal Regulations (e-CFR) (<https://www.ecfr.gov/cgi-bin/ECFR?page=browse>)



Chapter 7 – AmeriCorps Program Monitoring

7.1 Compliance Monitoring

All programs, regardless of their assessed risk, will undergo monitoring on an annual basis. Monitoring occurs throughout the year and is done based upon the program’s assessed level of risk. New programs are automatically considered high risk. Programs can have a different assessment of risk for each area – Financial Management (financial risk) and Program and Member Management (programmatic risk). Monitoring levels are assessed bi-annually. Serve Wisconsin reserves the right to conduct additional monitoring as deemed necessary.

A. Risk Assessment

The goal of effective risk management is to ensure that each risk is identified, documented, prioritized, and mitigated, whenever possible.

In order to effectively monitor compliance and progress, and provide an adequate level of both on-site and off-site technical assistance, each program will undergo a formal risk assessment conducted by Serve Wisconsin staff.

Using the Risk Assessment Tool, each program will be analyzed and assigned a risk level – high, moderate, or low. The resulting monitoring plan will specifically address issues contributing to the assessed risk for each program. The overall monitoring plan will allow for the most time-intensive monitoring of the highest risk programs, with less time-intensive monitoring strategies applied, as appropriate, to lower risk programs.

Serve Wisconsin staff will assess the risk associated with each program on a bi-annual basis (August and February). Based on the risk assessment, staff will monitor each program, as appropriate, according to the identified risk factors and risk categories outlined in the Monitoring Components section.

All organizations, regardless of their assessed risk, will undergo monitoring on an annual basis. Additional monitoring will be based on individual program needs and/or identified concerns. Monitoring may be adjusted throughout the program year, as necessary. All first-year programs will be considered high financial and programmatic risk. Fixed amount grants will not undergo a financial risk assessment or financial monitoring.

High Financial Risk

Programs receiving a high financial risk assessment will undergo a monthly review of all financial claims prior to approval (for three months or until notified to stop), and an annual financial desk review.

High Programmatic Risk

Monitoring efforts of high risk programs will focus on the factors contributing to the risk of the program. Serve Wisconsin staff will provide a detailed report with any continuous improvement or compliance issues that must be remediated.

High risk programs will receive a minimum of two site visits per year. The first visit will be conducted within 3 months of the program start date, and the second visit will be conducted approximately 6 months into the program year. Site visits will focus heavily on the areas contributing to the high risk designation for the program.

In addition to the site visits, Serve Wisconsin staff will review member timesheets, the member enrollment rate, a complete member file review, member exit data, and member training and education hours.



Moderate Financial Risk

Programs receiving a moderate financial risk assessment will undergo a review of all financial claims for a selected period and an annual financial desk review.

Moderate Programmatic Risk

Monitoring efforts of moderate risk programs will focus on the factors contributing to the risk of the program. Serve Wisconsin staff will provide a detailed report with any continuous improvement or compliance issues that must be remediated.

Moderate risk programs will receive at least one site visit per year. Additional visits may be conducted on an as-need and/or requested basis. Site visits will focus heavily on the areas contributing to the moderate risk designation for the program.

In addition to the site visit, Serve Wisconsin staff will review member timesheets, the member enrollment rate, a complete member file review, member exit data, and member training and education hours.

Low Financial Risk

Programs receiving a low financial risk assessment will undergo an annual financial desk review.

Low Programmatic Risk

Monitoring efforts of low risk programs will focus on the factors contributing to the risk of the program. Serve Wisconsin staff will provide a detailed report with any continuous improvement or compliance issues that must be remediated.

Serve Wisconsin staff will review member timesheets, the member enrollment rate, member exit data, and member training and education hours.

A site visit may be conducted if warranted as a result of desk monitoring, or if the program has not received one in the past three years.

B. Monitoring Components

Monitoring occurs throughout the year and is done based upon the program's assessed level of risk. New programs are automatically considered high risk. Programs can have a different assessment of risk for each area – Financial Management and Programmatic Management. Monitoring levels are assessed bi-annually. Serve Wisconsin reserves the right to conduct additional monitoring as deemed necessary.

Document Review

Program documents will be reviewed to ensure accuracy and compliance, that they include all necessary information to meet CNCS and Serve Wisconsin requirements, and that the host site agreement/orientation/training agenda includes prohibited activities training, how the member will be supervised, and what types of activities are occurring.

Program staff will gather and upload the following documents for review:

- Member Recruitment Materials
- Member Application
- Member Orientation Agenda
- List of Member Trainings
- Health Care Roster/Invoice
- AmeriCorps Staff Member Position Descriptions
- Host Site Service Contract
- Host Site Supervisor Orientation Agenda



- Host Site Monitoring Form
- Name & Mailing Addresses
- Non-Discrimination Public Notice
- Conflict of Interest Policy
- Personally Identifiable Information (PII) Policy

As programs make changes to any of these document, they will upload a new copy and notify their Program Officer of the change.

Financial Claims Review

Periodic expense reports will be reviewed to ensure expenses do not exceed 10% of budget, sufficient match is reported, Admin costs do not exceed allowable expenses, and to ensure funds are being spent timely/according to plan.

Budget Review

Budgets will be reviewed to ensure funds are being spent timely/according to plan. Agencies may be requested to follow up if issues are identified.

Annual Financial Desk Review

Review of the financial aspects of programs including general ledgers, bridge documents, time sheets, payroll registers, and other requested financial documentation.

Member Timesheet Review

An administrative review which will ensure the following:

- There are no members with late or missing timesheets;
- Timesheets are completed by members and approved by supervisors within 30 days;
- There are no members with more than 100 hours pending approval;
- There are no members with zero training hours;
- There are no members with more than 10% of their time spent on fundraising; and
- There are no members who need to serve more than 40 hours per week in order to complete their term of service on time.

All programs are required to ensure that time and attendance recordkeeping is entered into and approved in the OnCorps online timekeeping system on a regular basis. If issues are identified, additional timesheets may be reviewed.

Member Recruitment Status

The member enrollment rate (filled slots divided by granted slots) is reviewed for progress towards the program's recruitment goals.

Current Member File Review

A random sample of current member files are reviewed to ensure the following:

- The enrollment date matches in both eGrants and OnCorps;
- The member completed and passed a criminal background check on or before their first day of service;
- A completed member application is on file; and
- A completed member service agreement is on file.



Exited Member File Review

A random sample of exited member files from the previous grant year (if applicable) are reviewed to ensure the following:

- For members serving full time, a completed mid-term performance evaluation is on file;
- For all members, a completed end of term performance evaluation is on file;
- The exit date matches in both eGrants and OnCorps;
- Members were exited within 30 days; and
- When applicable, early exit documentation is on file.

Member Exit Data

Member exit approval cycle data from the previous grant year (if applicable) is reviewed to ensure that members were exited within 30 days.

Site Visit

Site visits will focus heavily on the areas contributing to the risk designation for the program. Site visits may consist of the following: program staff interview, fiscal staff interview, member interview(s), on-site member observations, and on-site supervisor interviews.

Check-In Calls

Check-in calls are conducted with all applicable Serve WI staff and program staff to discuss any ongoing issues, items for clarification, or just a general check-in with programs.

Progress and Performance Measure Reporting

Program progress reports and performance measure data is reviewed quarterly for all programs.

Grant Closeout Discussion

Program Officers review the grant closeout process with each program to ensure an accurate, timely closeout.

Member Training and Education Review

Member training and education hours will be reviewed to ensure the aggregate of all members does not exceed 20%.

7.3 Monitoring Site Visits

Based on the risk level assigned to the program, the monitoring required may be different. During a monitoring visit, the program officer's monitoring activities may include: the program's compliance with the AmeriCorps Terms and Conditions, progress towards meeting performance measures, program operation and management, and member and host site satisfaction.

When a monitoring visit is required, the Program Officer will contact the program director to schedule a monitoring date. Depending on the nature of the visit, the Program Officer and applicable Serve Wisconsin staff will meet with appropriate program staff members. If a program is found to be in violation of any compliance issues, the Program Officer will immediately follow up with the program director to begin corrective action. Programs that fail to adhere to corrective action are subject to suspension or discontinued funding according to the Grant Agreement.

New Programs

All first-year programs will automatically be considered high financial and programmatic risk, and will have two monitoring visits, one in November and one in February. Monitoring visits for new programs will focus on program operation and management, and is more of a technical assistance opportunity.



Risk-Indicated

Programs with a risk indicator of moderate will receive a monitoring visit in February, and high risk programs will receive a monitoring visit in November and February. Monitoring visits for high and moderate risk programs will focus on the areas contributing to the program’s risk.

Ongoing Compliance Issues

Programs with ongoing compliance issues may receive a monitoring visit at any point during the program year. Monitoring visits for programs with ongoing compliance issues will focus on the areas that continue to be of concern.

7.4 Monitoring Schedule

Monitoring occurs throughout the year and is done based upon the program’s assessed level of risk. New programs are automatically considered high risk. Programs can have a different assessment of risk for each area – Financial and Programmatic. Monitoring levels are assessed bi-annually. Serve Wisconsin reserves the right to conduct additional monitoring as deemed necessary. Fixed amount grants will not undergo a financial risk assessment or financial monitoring.

Financial

Monitoring Process	Monitoring Frequency	Monitoring Components/Tools
Periodic Expense Report (PER) Review		
All	Each reporting period	Program Officer reviews every PER submitted to ensure expenses do not exceed 10% of budget, sufficient match is reported, Admin costs do not exceed allowable expenses and to ensure funds are being spent timely/according to plan. Agencies may be requested to provide additional information if issues/questions are identified.
High	Monthly, until released by Serve Wisconsin staff	Prior to PER approval the Fiscal Officer will review the general ledger and all supporting documentation for all expenses for a minimum of three months, then until notified to cease, to ensure all expenses are allowable, reasonable, allocable, consistently applied, and adequately documented.
Moderate	One month	Prior to PER approval, the Program and Fiscal Officer will select one month or quarter to review the general ledger and all supporting documentation for all expenses to ensure all expenses are allowable, reasonable, allocable, consistently applied, and adequately documented.
Low	Annually	As part of the annual Financial Desk Review, the Program and Fiscal Officer will select one month or quarter to review the general ledger and all supporting documentation for all expenses to ensure all expenses are allowable, reasonable, allocable, consistently applied, and adequately documented.
Annual Financial Desk Review		
All	Annually	A sample of financial aspects of programs including general ledgers, bridge documents, time sheets, payroll registers, and other requested financial documentation, will be reviewed.



Programmatic

Monitoring Process		Monitoring Frequency	Monitoring Components
Member Timesheet Review			A random sample of member timesheets will be reviewed for timeliness, accuracy, allowability, and consistency with the goals and activities of the program. If issues are identified, additional timesheets may be reviewed. Low risk programs will receive an administrative review only, unless issues are identified.
	High	October, March, July	
	Moderate	October, March	
	Low	October, March	
Member Enrollment and Retention Status			Member enrollment rate and retention status will be reviewed for all programs, regardless of risk.
	All	November, January, August	
Current Member File Review			A random sample (20 high/10 moderate, more as necessary) of member files will be reviewed for the following components: enrollment date alignment, criminal history check information, and the member application.
	High	November	
	Moderate	November	
	Low	N/A	
Exited Member File Review			A random sample (20 high/10 moderate/5 low, more as necessary) of exited member files from the previous grant year (if applicable) will be reviewed for the following components: performance evaluations, exit date alignment, timely member exit, and early exit documentation, if applicable.
	High	November	
	Moderate	November	
	Low	November	
Member Exit Data			Member exit data from the previous grant year (if applicable) will be reviewed for all programs, regardless of risk.
	All	November	
Site Visit			Site visits will focus heavily on the areas contributing to the program's high risk areas. Site visits will consist of the following: program staff interview, fiscal staff interview, member interview(s), on-site member observations, and on-site supervisor interviews.
	High	November, February	
	Moderate	February	
	Low	N/A	
Check-in Calls			Check-in calls will be conducted with all applicable Serve WI staff and program staff to discuss any ongoing issues, items for clarification, or just a general check-in with programs.
	High	Monthly	
	Moderate	Bi-monthly	
	Low	Quarterly	
Progress and Performance Measure Reporting			Program progress reports and performance measure data will be reviewed quarterly for all programs, regardless of risk.
	All	January, April, July (if required), October	
Grant Closeout Discussion			Program Officers will review the grant closeout process with each program, regardless of risk, to ensure an accurate, timely closeout.
	All	August	
Member Training and Education Review			Member training and education hours will be reviewed to ensure the aggregate of all members does not exceed 20%.
	All	August	



Chapter 8 – Regulations and Other Grant Materials

8.1 Regulations, Terms and Conditions, and Other Grant Management

It is your responsibility as a subrecipient of Federal funds to understand and follow all requirements and Terms and Conditions for your Federal award, including the laws and regulations that govern the award referenced in the Terms and Conditions of your grant award. The links below allow quick access to the regulations, Terms and Conditions, and other useful information for your AmeriCorps grant.

A. Web Links to Bookmark

- [The National and Community Service Act of 1990](#), as amended by the Serve America Act
- [AmeriCorps Regulations](#)
 - [Update to National Criminal History Check Regulations](#) (October 5, 2012)
- [AmeriCorps Terms and Conditions/Terms and Conditions](#) – all years (make sure you are referencing the most recent Terms and Conditions)
- [AmeriCorps Prohibited Activities](#)
- [Office of Management and Budget \(OMB\) Guidance](#)
 - See sections regarding Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards
- [AmeriCorps State and National Policy FAQs](#)
- [CNCS Notice of Current Federal Funding Opportunities](#)
- [National Service Knowledge Network](#)
- [Managing AmeriCorps Grants](#)
- [CNCS Mega Search Document](#)
 - Note: This document combines many of those above to make searching for key terms easier. While efforts are made to keep information in the consolidated document current, please consult the primary sources for the most up-to-date information.

8.2 Civil Rights and Equal Opportunity Requirements

As with all federal grant programs, you must ensure that your programs or activities, including those of any subgrantees, will be conducted, and facilities operated, in compliance with the applicable civil rights statutes and their implementing regulations. You must obtain assurances of such compliance prior to extending federal financial assistance to subgrantees. For civil rights purposes, all programs and projects funded or receiving service members under the National and Community Service Act, as amended, are programs or activities receiving federal financial assistance

Please review and refer to the following Civil Rights/Equal Opportunity policies and guidelines.

A. Grant Program Civil Rights Policy

The Corporation for National and Community Service (CNCS) has zero tolerance for the harassment of any individual or group of individuals for any reason. CNCS is committed to treating all persons with dignity and respect. CNCS prohibits all forms of discrimination based upon race, color, national origin, gender, age, religion, sexual orientation, disability, gender identity or expression, political affiliation, marital or parental status, or military service. All programs administered by, or receiving federal financial assistance from CNCS must be free from all forms of harassment.

Harassment is unacceptable in CNCS offices or campuses, in other service-related settings such as training sessions or service sites, and at service-related social events. Any such harassment, if identified, will result



in immediate corrective action, up to and including removal or termination of any CNCS employee or national service participant. All recipients of federal financial assistance, including individuals, organizations, programs and/or projects are also subject to this zero tolerance policy. When a violation occurs, appropriate corrective action subject to regulatory procedures will take place, up to and including termination of federal financial assistance from all federal sources.

Slurs and other verbal or physical conduct relating to an individual's gender, race, ethnicity, religion, sexual orientation or any other basis constitute harassment when such behavior has the purpose or effect of interfering with service performance or creating an intimidating, hostile, or offensive service environment. Harassment includes, but is not limited to: explicit or implicit demands for sexual favors; pressure for dates; deliberate touching, leaning over, or cornering; offensive teasing, jokes, remarks, or questions; letters, phone calls, or distribution or display of offensive materials; offensive looks or gestures; gender, racial, ethnic, or religious baiting; physical assaults or other threatening behavior; and demeaning, debasing or abusive comments or actions that intimidate.

CNCS does not tolerate harassment by anyone, including persons of the same or different races, sexes, religions, or ethnic origins; a CNCS employee or supervisor; a project, or site employee or supervisor; a non-employee (e.g., client); or a co-worker or national service participant.

Serve Wisconsin expects supervisors and managers of CNCS programs and projects, when made aware of alleged harassment by employees, national service participants, or other individuals, to immediately take swift and appropriate action. CNCS will not tolerate retaliation against a person who raises harassment concerns in good faith. Any CNCS employee who violates this policy will be subject to discipline, up to and including termination and any grantee that permits harassment in violation of this policy will be subject to a finding of non-compliance and administrative procedures that may result in termination of federal financial assistance from CNCS and all other federal agencies.

Any person who believes that he or she has been discriminated against in violation of civil rights laws, regulations, or this policy, or in retaliation for opposition to discrimination or participation in discrimination complaint proceedings (e.g., as a complainant or witness) in any CNCS program or project, may raise his or her concerns with the CNCS Equal Opportunity Program (EOP). Discrimination claims not brought to the attention of EOP within 45 days of occurrence may not be accepted in a formal complaint of discrimination. You are not required to use a program, project, or sponsor dispute resolution procedure before contacting the EO P. If another procedure is used, it does not affect the 45-day time limit. The EOP may be reached at (202) 606-7503 or eo@cns.gov.

B. Direct Links to Policies and Guidelines

To see the Corporation's civil rights, harassment, and equal opportunity policies and guidelines, go to <https://www.nationalservice.gov/build-your-capacity/grants/civil-rights-eo-reqs>.

8.3 Serve Wisconsin Guidance Memos

All of the guidance memos issued by Serve Wisconsin or CNCS can be found on [Basecamp](#). These memos provide specific guidance on the following topics or issues:

- 16-Year-Olds Participating in Youth Corps Programs
- Enrolling AmeriCorps Members Who Are Concurrently Employees (or employing AmeriCorps members who are currently serving)
- Members Serving Two Consecutive Terms in the Same Program Year



- Exiting a Member for Compelling Personal Circumstances When the Member Leaves for an “Acceptable” Employment Opportunity
 - See also: Serve WI CPC Employment Form in Program Resources—Exiting Members
- CNCS Living Allowance Waiver Requests and Approvals
- Member Position Conversions & Corrections in MyAmeriCorps Portal
- Restrictions on Legislative Lobbying and Partisan Politics
- Youth Corps Programs’ Use of Quarter-Time and Minimum-Time Slots
- Zero-Hour Timesheets and Additional Service Hours

8.4 Unemployment Insurance State Statutes

Below are resources detailing how AmeriCorps Members are exempt from unemployment insurance in the State of Wisconsin. The Final letter from the U.S. Department of Labor can be found on Basecamp under Program Resources, Financial Guidance.

- Wisconsin State Statute 108.02(15)(j) <http://docs.legis.wisconsin.gov/statutes/statutes/108/02/15>
- 2005 Wisconsin Act 86, Amendments to Wisconsin Statutes Chapter 108, Unemployment Insurance Law (starts on page 7) <http://docs.legis.wisconsin.gov/statutes/statutes/108/>
- CNCS Frequently Asked Questions, C.23. Is the grantee required to provide unemployment insurance? [http://www.nationalservice.gov/sites/default/files/documents/AmeriCorps State National Policy FAQs.pdf](http://www.nationalservice.gov/sites/default/files/documents/AmeriCorps%20State%20National%20Policy%20FAQs.pdf)



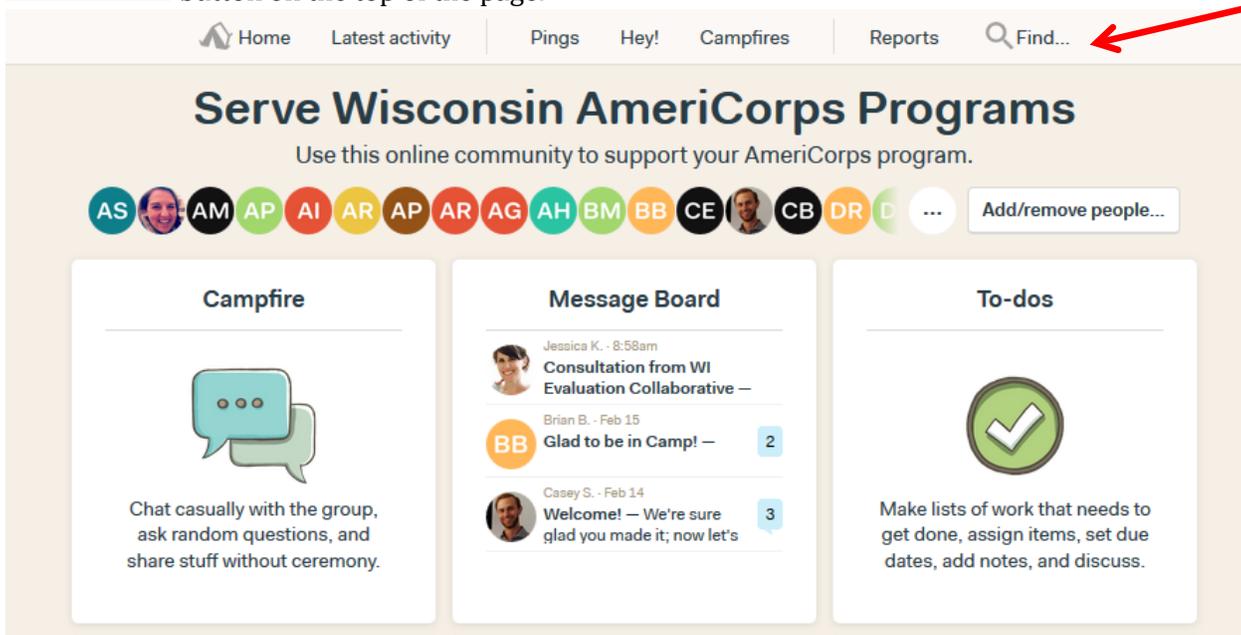
Chapter 9 – Program Resources

9.1 Using Basecamp to Access Program Resources

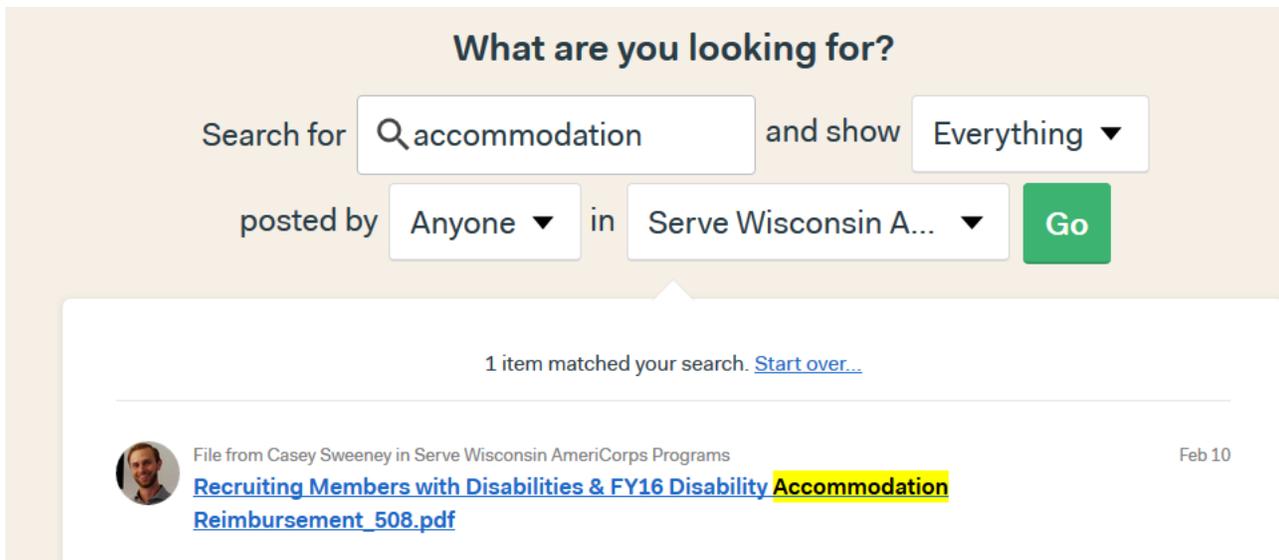
There are a bunch of resources stored on Basecamp intended to support AmeriCorps programs work. There are a couple of ways we hope that you use Basecamp to quickly find the resources you are after – whether you know you are after them or not.

First, try searching for resources based on keywords. For example, say you are looking to find resources on how to appropriately accommodate an AmeriCorps member who has disclosed a disability. Start by clicking the

 button on the top of the page.



Since you're looking for resources on how to accommodate members, accommodation would be an appropriate keyword to use to search. You enter the keyword, click *Go*, and find one result.



Since the only result is dealing with accommodation reimbursement, it isn't quite relevant to you. So, you turn to the second method of finding resources on Basecamp: good old fashioned browsing. Trust us, it really isn't as hard as it sounds.

You start by entering into the Docs & Files section of Basecamp.

Serve Wisconsin AmeriCorps Programs
Use this online community to support your AmeriCorps program.

AS AM AP AI AR AP AR AG AH BM BB CE CB DR D ... Add/remove people...

Campfire
Chat casually with the group, ask random questions, and share stuff without ceremony.

Message Board
Jessica K. - 8:58am
Consultation from WI Evaluation Collaborative –
Brian B. - Feb 15
Glad to be in Camp! – 2
Casey S. - Feb 14
Welcome! – We're sure glad you made it; now let's 3

To-dos
Make lists of work that needs to get done, assign items, set due dates, add notes, and discuss.

Schedule
Mar 2 - Mar 10
Continuation Application Clarification Period
Mar 4 - Mar 11
AmeriCorps Week
Mar 13

Docs & Files
Program R...
Wisconsin AmeriCorps 2015-16 Program Director Handbook (Updated 1.13.16).
Funding O...
...and 2 more

Email Forwards
Jessica Keesler
Partners for After School Succ...
nrbowmanfarr@wisc.edu (via Jessica K.)
Feb 22nd, 2017: Dr. Hazel Sym...
DHServeWisconsin@dhs.wiscons...
Updated Reflection Pieces... 1
statecommissions-gmail.com@ma...
Registration open for 2017... 1
Casey Sweeney
AmeriCorps Member Recruit...

Once there, enter into the Program Resources folder. Once you do, you will see many folders come up. Now, since we are looking for accommodation resources, search for any folders that would be relevant to that topic. In that search you happen to find the Disability Inclusion & Accommodation folder. You may be asking why this folder didn't show up in the search. That is because the search feature only searches document and file titles, not for words within the documents or folder titles.

Now in the Disability Inclusion & Accommodation folder you see four documents, shown below. One of them showed up in the original search, the other three are new. By looking through the remaining three, you find relevant information relating to your search to find more information about accommodating members.



Serve Wisconsin AmeriCorps Programs

Campfire | Message Board | To-dos | Schedule | Docs & Files | Email Forwards

Rename

Docs & F | Program Resou | Disability Inclusion & Accommodation



Start a doc | Upload files | Link a Google doc | New folder

Recruiting Members with Disabilities & FY16 Disability Accommodation Reimbursement_50

Request_Documentation_for_Reasonable_Accommodation.pdf

JAN Disability Inclusion Training
<http://askjan.org/landingpage/NatComSvc2014/>

CNCS Disability Inclusion Resources
<https://www.nationalsevice.gov/resources/disability-inclusion>

