Core Elements of Effective Program Oversight

Jennifer Cowart
Outcomes

• Understand the key components of a strong oversight process

• Refine and/or create systems to ensure site, member and program compliance

• Assess current oversight processes and practices
Agenda

• Building the Learning Environment
• Current Context
• Oversight Process
• Program Assessment
You need to know . . .

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

CNCS and/or your State Commission may impose additional or varied requirements.
Program Hierarchy of Needs

- High Quality Principles
- Systems
- Policies and Procedures
- Compliance
Current Context

• Focus on Compliance

• Focus on Retention
  – Whether it is a requirement or because your partners and organization depend upon the ability to have someone for a minimum of one year
  – Emphasis on a high retention rate

• Focus on Recruitment
  – Member Service Years – 100% recruitment rate

• Increased Emphasis on Impact
  – Have to recruit the right members for the right positions so that you get the most impact for the dollars you receive

• Scrutinized Federal Dollars and Increased Competition
Management Cycles

Program

Data

Fiscal

Site

Member
Core Elements of Effective Program Oversight

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

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

I have read the CaliforniaVolunteers contract and exhibits for this year?
Activity
Time!!
Poll

Our program collects and reviews data on applicant interview scores?
### Interview Rating Form

2. **Initiative (Question 6 & 7)**  
   Ability to show initiative in previous workplace settings.  
   
   | 1 | 2 | 3 | 4 | 5 |

3. **Dedication (Question 8 & 9)**  
   Ability to show commitment to a project.  
   
   | 1 | 2 | 3 | 4 | 5 |

4. **Maturity (Question 10 & 11)**  
   Ability to show maturity in a workplace setting.  
   
   | 1 | 2 | 3 | 4 | 5 |

5. **Teamwork (Questions 12 & 13)**  
   Ability to show an understanding of teamwork skills.  
   
   | 1 | 2 | 3 | 4 | 5 |

6. **Working with “at-risk” Youth (Questions 14 & 15)**  
   Awareness of educational issues and ability to adapt leadership in different situations.  
   
   | 1 | 2 | 3 | 4 | 5 |

7. **Problem Solving Skills (Questions 16 - 18)**  
   Ability to problem solve and operate in various situations.  
   
   | 1 | 2 | 3 | 4 | 5 |

8. **Boundaries (Question 19 & 20)**  
   Ability to maintain a distinction between personal and school appropriate relationships.  
   
   | 1 | 2 | 3 | 4 | 5 |
### Interview Analysis

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Initiative</th>
<th>Dedication</th>
<th>Maturity</th>
<th>Teamwork</th>
<th>Working with &quot;at risk&quot; youth</th>
<th>Problem Solving Skills</th>
<th>Boundaries</th>
<th>Total Interview Score</th>
<th>Offered</th>
<th>Accepted</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bueller</td>
<td>Ferris</td>
<td>5</td>
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<td>5</td>
<td>4</td>
<td>4</td>
<td>5</td>
<td>30</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Explorer</td>
<td>Dora</td>
<td>4</td>
<td>3</td>
<td>4</td>
<td>4</td>
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<td>4</td>
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<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>America</td>
<td>Captain</td>
<td>4</td>
<td>5</td>
<td>4</td>
<td>5</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>26</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Woman</td>
<td>Wonder</td>
<td>3</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>25</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Average</strong></td>
<td></td>
<td><strong>4</strong></td>
<td><strong>3.75</strong></td>
<td><strong>3.75</strong></td>
<td><strong>4.75</strong></td>
<td><strong>3.25</strong></td>
<td><strong>3</strong></td>
<td><strong>3.75</strong></td>
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<td></td>
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</table>

### Application Overview

<table>
<thead>
<tr>
<th>Year</th>
<th>No. of Applicants</th>
<th>No. of Interviews Scheduled</th>
<th>No. of Interviews Conducted</th>
<th>No. Accepted</th>
<th>% Applicants Accepted</th>
<th>% Interviewed Accepted</th>
<th>Avg. Accepted Interview Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015-2016</td>
<td>283</td>
<td>116</td>
<td>Jan: 42, Feb: 12, Mar: 20, April: 7, May: 22, June: 10, July: 3, Total: 116</td>
<td>85</td>
<td>30.04</td>
<td>73.28</td>
<td>54.35</td>
</tr>
</tbody>
</table>
Outline

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

2. Timeline/Calendar
   - A calendar of events and anticipated activities (internal and external) for the upcoming 12-18 months.
Strong Program Design and Aligned Performance Measures

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

• Analyze which areas each of your stakeholders are involved in
• Where else can they take a role and what is that role?
**Performance Measure Instructions**

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table of Contents</td>
<td></td>
</tr>
<tr>
<td>PO Tips for Using This Document</td>
<td>3</td>
</tr>
<tr>
<td>AmeriCorps State and National Performance Measures Requirements</td>
<td>4</td>
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<tr>
<td>AmeriCorps State and National Performance Measures Selection Rules</td>
<td>5</td>
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<td>DISASTER SERVICES</td>
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<td>ECONOMIC OPPORTUNITY</td>
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<td>85</td>
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<td>HEALTHY FUTURES</td>
<td>105</td>
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<tr>
<td>VETERANS AND MILITARY FAMILIES</td>
<td>124</td>
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<tr>
<td>CAPACITY BUILDING</td>
<td>142</td>
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<tr>
<td>Appendix A: MSY and Member Allocations</td>
<td></td>
</tr>
<tr>
<td>Appendix B: Performance Measure Checklist</td>
<td></td>
</tr>
<tr>
<td>Appendix C: Frequently Asked Questions</td>
<td></td>
</tr>
</tbody>
</table>
## CV Performance Measurement Worksheets Checklist

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

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Does Not Meet</th>
<th>Needs Improvement</th>
<th>Meets</th>
<th>N/A</th>
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<tr>
<td>Alignment with Narrative/TOC</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interventions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dosage</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resource Allocation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Selection Rules/Performance Measure Instructions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Applicant determined outputs and outcomes are aligned correctly</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Performance Measure Instructions

- **Alignment with Narrative/TOC:** Focus areas, interventions, outputs and outcomes are consistent with the application narrative, logic model and theory of change.
- **Interventions:** The interventions described contribute directly to the outputs and outcomes.
- **Dosage:** The dosage (frequency, intensity, duration of intervention) is described and is sufficient to achieve outcomes.
- **Resource Allocation:** MSY and member allocation are consistent with the member activities/time spent on member activities described in the application narrative and amount of Service row. MSY is completely allocated across all performance measures.
- **Selection Rules/Performance Measure Instructions:** The applicant has at least 1 aligned output and outcome for the primary performance measure. National Performance Measures conform to selection rules, definitions and data collection requirements specified in the Performance Measure Instructions. (Compliance with definitions and data collection requirements must be clearly explained in the Instrument section or must be clarified.)
- **It is clear that beneficiaries are not double-counted in an aligned performance measure.**
- **National Performance Measures count beneficiaries, not AmeriCorps members, unless the measure specifies that national service participants are to be counted.**
- **The population counted in each National Performance Measure is the population specified in the Performance Measure Instructions.**
- **Applicant is not using applicant-determined member development or volunteer generation measures that are the same or similar to National Performance Measures or Grantee Progress Report indicators (e.g., number of volunteers).**
- **Alignment & Quality:** Applicant-determined outputs and outcomes are aligned correctly. Outputs and outcomes clearly identify what is counted. Each output or outcome counts only one thing (except certain National Performance Measures). Outcomes clearly identify a change in knowledge, attitude, behavior or condition. (Counts that do not measure a change are outputs and must be labeled as such.) Outcomes clearly specify the level of improvement necessary to be counted as “Improved” and it is clear why this level of improvement is significant for the beneficiary population served. Outcomes count individual-level gains, not average gains for the population served. Outcomes measure meaningful/significant changes and are aligned with the applicant’s theory of change. (Note: Outcomes that do not measure significant changes in knowledge, attitude, behavior or condition should be revised. If the applicant is not able to propose a meaningful outcome, the aligned performance measure should be removed. CNCS prefers that applicants...
What do you think of when you hear the phrase extensive, regular and impactful site, member and staff training?
Extensive, Regular and Impactful Site, Member and Staff Training

• Focuses on the heart of the program
• Increases likelihood of a strong member experience and member, site and staff retention
Member Training Plan

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

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

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

October
- Agency Database Training
- Bullying
- Gangs

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

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

January
- Life After AmeriCorps

February
- Client Termination – Healthy Goodbyes
# Member Training Plan

**Member Name:**  
**Site Name:**  
**WSC Program Coordinator:**

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

## WSC Individual Placement Required Core Training

<table>
<thead>
<tr>
<th>Competencies</th>
<th>Name of Trainer and Curriculum</th>
<th>Date Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AmeriCorps Affiliation &amp; Program Orientation</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Demonstrate knowledge of the structure of AmeriCorps and other national service programs and understand where they belong in the large national movement.</td>
<td></td>
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</tr>
<tr>
<td>2. Properly introduce themselves and their program as well as describe their role as an AmeriCorps member.</td>
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<tr>
<td>3. Articulate and model a definition of ethic of service including how service is different than a job.</td>
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</tr>
<tr>
<td>4. Demonstrate knowledge of the goals and objectives of their programs.</td>
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</tr>
<tr>
<td><strong>Cultural Awareness</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Know and recognize the components of cultural competency.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Treat others with respect, trust and dignity.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Be aware and be respectful in the communities they serve.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Self-evaluate their knowledge of cultural/diversity issues.</td>
<td></td>
<td></td>
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<tr>
<td>5. Effectively serve and interact with people from diverse backgrounds.</td>
<td></td>
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</tr>
</tbody>
</table>
Forming

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

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

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

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

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

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- Life After AmeriCorps

February
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Site Orientation Checklist

Member Name: ____________________  Site: ____________________

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

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

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

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

Please note this form must be turned in to the AmeriCorps office by Tuesday, October 7th.
XYZ AmeriCorps
Site Expectations

Member Name: ________________________ Campus: ______________

Please note this form must be turned in to the AmeriCorps office by October 7th, 2017. The below expectations are the established guidelines for your assigned XYZ service site.

1. Dress Code - ______________________________________________________
   ___________________________________________________________________
   ___________________________________________________________________

2. Telephone Etiquette - ________________________________________________
   ___________________________________________________________________
   ___________________________________________________________________

3. Tardiness/Absences - _________________________________________________
   ___________________________________________________________________
   ___________________________________________________________________

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

5. Student scheduling - ___________________________________________________
   ___________________________________________________________________
   ___________________________________________________________________

6. Service Logs/Data Entry - _____________________________________________
   ___________________________________________________________________
   ___________________________________________________________________

7. Supervision Expectations - ____________________________________________
   ___________________________________________________________________
   ___________________________________________________________________

8. Student crisis when supervisor is off-site – ______________________________
   ___________________________________________________________________
   ___________________________________________________________________

9. Downtime - ___________________________________________________________________
   ___________________________________________________________________
   ___________________________________________________________________
Training and Paperwork Calendars
• Joint Trainings
• Mentoring Programs
Detailed Member Position Descriptions, Member Service Agreements and Site Agreements
Detailed Member Position Descriptions, Member Service Agreements and Site Agreements

Member position description includes the following:

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

<table>
<thead>
<tr>
<th></th>
<th>Half-time Members</th>
<th>Full-Time Members</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>September 30, 2015</strong></td>
<td>(113) 113 Hours</td>
<td>(189) 189 Hours</td>
</tr>
<tr>
<td><strong>October 31, 2015</strong></td>
<td>(100) 213 Hours</td>
<td>(191) 380 Hours</td>
</tr>
<tr>
<td><strong>November 30, 2015</strong></td>
<td>(84) 297 Hours</td>
<td>(158) 538 Hours</td>
</tr>
<tr>
<td><strong>December 31, 2015</strong></td>
<td>(64) 361 Hours</td>
<td>(122) 660 Hours</td>
</tr>
<tr>
<td><strong>January 31, 2015</strong></td>
<td>(90) 451 Hours</td>
<td>(171) 831 Hours</td>
</tr>
<tr>
<td><strong>February 29, 2016</strong></td>
<td>(97) 548 Hours</td>
<td>(179) 1,010 Hours</td>
</tr>
<tr>
<td><strong>March 31, 2016</strong></td>
<td>(80) 628 Hours</td>
<td>(151) 1,161 Hours</td>
</tr>
<tr>
<td><strong>April 30, 2016</strong></td>
<td>(95) 723 Hours</td>
<td>(185) 1,346 Hours</td>
</tr>
<tr>
<td><strong>May 31, 2016</strong></td>
<td>(97) 820 Hours</td>
<td>(178) 1,524 Hours</td>
</tr>
<tr>
<td><strong>June 30, 2016</strong></td>
<td>(99) 910 Hours</td>
<td>(178) 1,702 Hours</td>
</tr>
</tbody>
</table>
Regular and Thorough Monitoring Procedures and Systems

• Relates to all five management cycles
• Impact on cost-findings
• Don’t expect what you don’t inspect.
Site Management

• Site visit calendar
• Site visit interview forms
• Site visit feedback forms
• Site supervisor evaluations
• Data quality checks
• Desk audits and site audits to ensure compliance
# FoodCorps Site Visit Monitoring Tool

## Site Monitoring Tool

### I. PROGRAM MANAGEMENT

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

<table>
<thead>
<tr>
<th>No.</th>
<th>Last Name</th>
<th>First Name</th>
<th>Site</th>
<th>Term</th>
<th>Enrollment Date</th>
<th>N SOPW</th>
<th>State of Service Initiated</th>
<th>State of Service Completed</th>
<th>Application State</th>
<th>Out of State Initiated</th>
<th>Out of State Completed</th>
<th>FBI Check Initiated</th>
<th>FBI Check Completed</th>
<th>Initial NSCHC Email Sent</th>
<th>Final NSCHC Email Sent</th>
</tr>
</thead>
</table>

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

AmeriCorps Advantage: CaliforniaVolunteers 2017 Grantee Training Conference
# Member Files Management

## Member Files 2015-2016

<table>
<thead>
<tr>
<th>Term</th>
<th>Last Name</th>
<th>First Name</th>
<th>Service Site</th>
<th>My AmC Invite</th>
<th>My AmC Enr.</th>
<th>App.</th>
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<td>G. Member and Staff Training</td>
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Poll

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

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

Jennifer Cowart
jeftsconsulting@gmail.com
956-827-5298