

CalSERVES AmeriCorps

Volunteer Infrastructure Project – Service Enterprise Sites



Partner Site Handbook

2017-18



NAPA COUNTY OFFICE
OF
EDUCATION

TABLE OF CONTENTS

<u>WELCOME TO THE CALSERVES AMERICORPS VOLUNTEER INFRASTRUCTURE PROJECT-SERVICE ENTERPRISE.....</u>	<u>5</u>
<u>ABOUT AMERICORPS.....</u>	<u>18</u>
<u>PARTNER SITE ROLE</u>	<u>24</u>
<u>YOUR ROLE AS SUPERVISOR</u>	<u>32</u>
<u>VIP-SE FELLOW TRAINING AND COACHING.....</u>	<u>45</u>
<u>CALSERVES PROGRAM EVALUATION</u>	<u>48</u>
<u>APPENDIX.....</u>	<u>56</u>
<u>APPENDIX A: IMPORTANT FORMS.....</u>	<u>56</u>
<u>APPENDIX B: HELPFUL RESOURCES.....</u>	<u>64</u>

Your organization WILL get even more done this year.
Thanks for partnering with CalSERVES AmeriCorps
programs.

Notice of nondiscrimination:

It is against the law for organizations that receive federal financial assistance from the Corporation for National and Community Service to discriminate on the basis of race, color, national origin, disability, sex, age, political affiliation, or in most cases, religion. It is also unlawful to retaliate against any person who, or organization that, files a complaint about such discrimination. In addition to filing a complaint, with local and state agencies that are responsible for resolving discrimination complaints, you may bring a complaint to the attention of the Corporation for National and Community service. If you believe that you or others have been discriminated against, or if you want more information, contact:

CalSERVES AmeriCorps Programs

VIP Program Manager Barbara Thorsen: bthorsen@napacoe.org

Address: 1450 Technology Lane, Suite 200, Petaluma, CA 94954

Phone: 1-888-560-7378

or

Office of Civil Right and Inclusiveness

Corporation for National and Community Service

Phone: (202) 606-7503

TTY and reasonable accommodation line: (202) 606-3472 (TTY)

Email: eo@cns.gov

Website: <http://www.nationalservice.gov/>

Acknowledgment of Support

CalSERVES AmeriCorps programs are administered by CaliforniaVolunteers and sponsored by the Corporation for National and Community Service.

This material is based upon work supported by CaliforniaVolunteers and the Corporation for National and Community Service. Opinions or points of view expressed in this document are those of the authors and do not necessarily reflect the official position of, or a position that is endorsed by, the Corporation or the AmeriCorps program.

Dear Partner Site staff:

Welcome to the CalSERVES AmeriCorps family of programs! We're so glad that you've chosen to partner with us in our 20th year of service to better serve your community and "get things done for America," in the words of the famous AmeriCorps slogan.

Through the Volunteer Infrastructure Project – Service Enterprise (VIP-SE), we partner with established experts (like you!) to bolster important service work through the effective use of volunteers. You're a part of a movement of nearly 60 fellow nonprofit, educational, and government organizations across California aiming to incorporate Service Enterprise best practices through AmeriCorps VIP service.

As a participating organization (or Partner Site, as we'll refer to you), you've been awarded an allotment of VIP-SE AmeriCorps members: the bread and butter of the program. These individuals dedicate 1700 hours of AmeriCorps service time and bring with them passion, enthusiasm, and skill. Backed by your support and direction, as well as training from the Supervising Organization, your AmeriCorps member(s) will help steer your organization towards its Service Enterprise and volunteer programming goals.

Over the year, you'll work closely with your AmeriCorps member, your Supervising Organization, and the staff here at CalSERVES. This manual has been prepared for you to use as a resource and reference for your organization's participation in VIP-SE. Please read it carefully and refer to it often.

Questions will undoubtedly arise during the program year. Feel free to discuss these with your Supervising Organization or CalSERVES staff. Our primary goal is to help your organization meet its Service Enterprise goals through AmeriCorps service.

Getting things done with you,



Barbara Thorsen
Statewide Program Manager
BThorsen@napacoe.org
(707) 363-9627



Lauren Serpa
Statewide Program Coordinator
LSerpa@napacoe.org
(707) 287-3698



Lucas Valelly
Statewide Program Assistant
Ivalelly@napacoe.org
(707) 225-7458

WELCOME TO THE CALSERVES AMERICORPS VOLUNTEER INFRASTRUCTURE PROJECT – SERVICE ENTERPRISE

OUR VISION is to build *thriving, caring, service-oriented communities* whose members engage with expert service organizations to provide needed services for a thriving life – from food to education to health services – to California’s children and families.

OUR MISSION:

In VIP, we build effective volunteer programs within nonprofit and educational organizations that meet otherwise unmet needs in the lives of children and families by engaging community members and local businesses in high-impact service.

WHERE WE CAME FROM:

The AmeriCorps Volunteer Infrastructure Project (VIP) was formed in partnership between CalSERVES AmeriCorps/Napa County Office of Education and CaliforniaVolunteers in Spring 2009. At the time, many service organizations faced significant funding decreases and were struggling to address the significant challenges of California communities in economic need. Developing volunteer systems to harness the time and talent of caring community members was a cost-effective way to bolster these organizations and fulfill those otherwise unmet community needs. VIP addressed the overwhelming need for support in building volunteer programs across California to make sure essential services were provided to those who had hit hard times.

WHAT WE DO:

VIP is an umbrella project that includes three distinct programs: VIP Start Up, VIP K-12 and VIP Service Enterprise. Central to VIP is our team of 180 full-time AmeriCorps members across these two programs who work to develop high-impact volunteer programs that engage skills-based volunteers and business partners in service to communities in need. VIP AmeriCorps members (also called VIP Fellows) are placed in key community service organizations (like yours!), referred to as Partner Sites, to develop volunteer programs that support and expand the services that the organization provides. Because the needs facing our communities are vast and complex, our Partner Sites address diverse needs – from hunger to education to housing and beyond. VIP Partner Sites include established non-profit, government, and educational organizations that are united in focus on providing services to youth and their families through the service of community volunteers.

OUR (AND YOUR) VIP SERVICE ENTERPRISE GOALS

Your organization will gain volunteers: Based on your agency's needs and goals, each VIP Fellow placed at your organization will recruit, train, or place:

- **Ongoing volunteers** for long-term activities (20 hours per volunteer); and
- **Short-term volunteers** for one-time activities (1 hour per volunteer).

A key role of the VIP Fellow will be to recruit volunteers, and it's up to your agency to set your member's recruitment targets to make sure that all volunteers recruited fill meaningful roles that move your mission forward.

Your organization will develop an effective volunteer program centered on Service Enterprise principles: AmeriCorps VIP-SE Fellows provide assistance to Partner Sites to ensure they:

- **Achieve VIP's Standards of effective volunteer programs** (found on the Volunteer Capacity Assessment, aka VCA). Our goal is that **your agency will achieve at least 8 new indicators of volunteer capacity**, as measured by our VCA (see the VOLUNTEER CAPACITY ASSESSMENT in Appendix A). You will be identifying which indicators are the highest priority for your agency, and direct the AmeriCorps member to work on those indicators.
- **Incorporate Service Enterprise best practices into the agency's structure and operations.** If your agency is not yet certified as a Service Enterprise, the VIP Fellow will help prepare for the certification process. If your agency is already certified as a Service Enterprise, the Fellow will assist in continued efforts to incorporate these important principles. For more information about Service Enterprise, see the Service Enterprise section on page 14.

Your organization's volunteer program will benefit from funds raised by VIP Fellows: VIP Fellows increase resources available to the Partner Site through **fundraising at least \$2,000 each** – including cash and in-kind donations.

Your assigned AmeriCorps member will develop professional skills: VIP will provide training and support to encourage the development of AmeriCorps members. We expect that **80% of VIP Fellows will exhibit an increase in their skill development and overall effectiveness of 20%**, as measured by AmeriCorps Member Evaluation (see the CalSERVES AmeriCorps Fellow Performance Evaluation in Appendix A).

VIP Service Enterprise is the newest addition to the CalSERVES family of programs! You are pioneering a new program that pairs the best of VIP's volunteer infrastructure-building wisdom with Points of Light's highly effective Service Enterprise Initiative.

VIP-SE sites will experience accelerated growth in volunteer programs by addressing program structure from multiple angles.

WHO IS CalSERVES VIP?

VIP is managed on a statewide level by **CALSERVES**, a special project of the Napa County Office of Education's Community Programs department. CalSERVES has a rich history of running AmeriCorps programs since 1998, boasting a family of over 3,750 AmeriCorps Alumni who have served with our programs since our start. From direct service roles that work with youth to behind the scenes support offered by programs like VIP, CalSERVES initiatives place AmeriCorps members to address the complex needs of children and their communities across California. Along with our portfolio of other AmeriCorps programs, we at CalSERVES manage VIP program goals, provide program resources and trainings, and report on our impact to our AmeriCorps funder, CaliforniaVolunteers.

2017-18 VIP Program All-Cohort Map: K-12, Start Up, & Service Enterprise Sites



CalSERVES partners with community hubs, referred to as **SUPERVISING ORGANIZATIONS**, to oversee VIP on a local level. Supervising Organizations (SOs) coordinate localized teams of VIP Fellows, report program impact to CalSERVES, and work with their community's Partner Sites. Distributed throughout California, participating Supervising Organizations include: California Polytechnic State University San Luis Obispo, the City of Duarte, California State University Monterey Bay, the Center for Volunteer and Nonprofit Leadership, HandsOn Central California, Inland Empire United Way, Jewish Family Service of San Diego, Napa County Office of Education, OneOC, the Redwood Community Health Coalition, and the Volunteer Center of Santa Cruz.

PARTNER SITES are educational, nonprofit, and government organizations that provide needed services to their communities. Partner Sites host VIP AmeriCorps Fellows to develop a volunteer program at their organization.

AMERICORPS MEMBERS (VIP FELLOWS) are community leaders and engineers of volunteer programs. Members perform service day-to-day at their assigned Partner Site, engage with their local team of AmeriCorps members through the facilitation of the SO, and receive support from and report to CalSERVES.

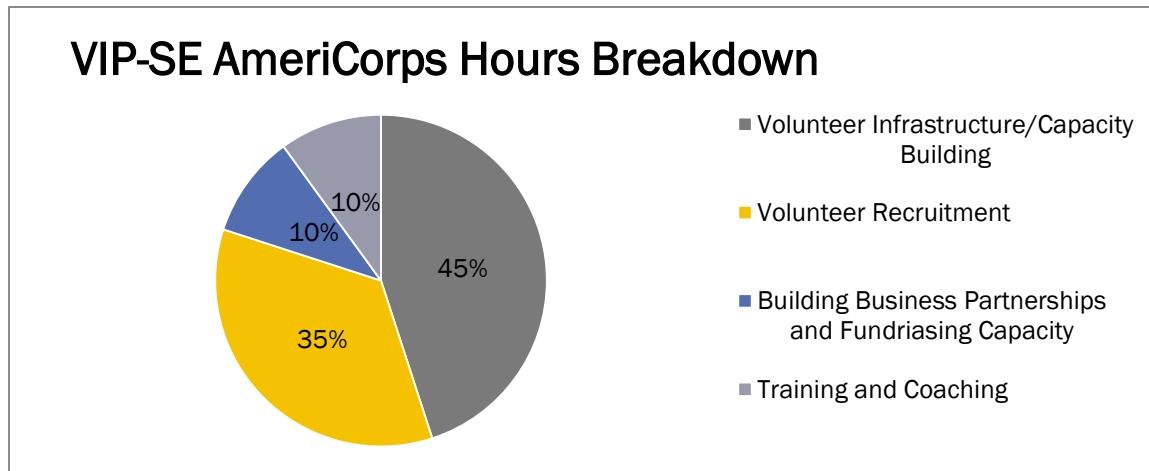
WHAT VIP-SE FELLOWS DO

AmeriCorps members are the main contributors of service that VIP-SE provides to Partner Sites like yours. The main goal of every VIP-SE Fellow is to work under the direction of you, the Partner Site supervisor, to develop a sustainable, high-quality volunteer management system by incorporating Service Enterprise principles. The increased infrastructure, volunteer support, and resources your VIP-SE Fellow will bring will allow your organization to serve clients more effectively.

Our AmeriCorps members serve 1700 hours or more over 11 months. Their time is dedicated to **four primary activity areas**:

1. **BUILDING INFRASTRUCTURE**/systems at the Partner Site to effectively engage volunteers and increase capacity to serve clients through volunteer programs.
2. **RECRUITING**, screening, training, or placing one-time and ongoing volunteers, with a focus on skills-based volunteers.
3. **FUNDRAISING**, or garnering new resources to increase and complement the Partner Site's service efforts through fundraising and the building of business partnerships.
4. Participating in **TRAINING** opportunities, including live and online trainings, team meetings, and coaching meetings with supervisors and team leaders.

Partner Sites' needs in volunteer infrastructure are different, so VIP positions differ in specific tasks. However, all VIP positions **require** a mix of the primary activity areas listed above. Here is the breakdown of hours VIP Fellows spend in each category:



Continue on the following pages to learn the types of activities that fall under each time category:

45% OF VIP-SE TIME (ABOUT 765 HOURS) IS SPENT ON VOLUNTEER

INFRASTRUCTURE/CAPACITY BUILDING. With this time, the Fellow will develop and implement a volunteer program, based on Service Enterprise principles, including the development of position descriptions, assessments and training programs. The goals of this time are to help your agency: 1) put in place at least 8 new indicators of volunteer capacity based on VIP's Volunteer Capacity Assessment; and 2) incorporate Service Enterprise principles. Here are examples of activities in this area:

- Collaborating with Partner Site staff to compile and complete an action plan to help the agency incorporate Service Enterprise principles.
- Conducting a needs assessment to define volunteer roles and create volunteer position descriptions.
- Establishing a plan to orient and train volunteers, including developing a volunteer handbook and training agendas.
- Developing a system to appreciate and recognize volunteers.
- Working with the Partner Site supervisor to track volunteer program and infrastructure development throughout the year.
- Communicating with Supervisors, Administrators, and Program Staff on an ongoing basis to meet the needs of the program.
- Conducting other infrastructure development activities as needed based on the Volunteer Capacity Assessment, VIP Member Work Plan, and your agency's Service Enterprise Action Plan.

35% OF VIP-SE TIME (ABOUT 595 HOURS) IS SPENT ON VOLUNTEER RECRUITMENT.

This is exactly what it sounds like – Fellows use this time to bring in volunteers.

Examples of activities in this area include:

- Tabling at community events to recruit community members.
- Making presentations during college classes, at community centers, or at other events and venues to solicit volunteer involvement.
- Creating and distributing flyers for volunteering.
- Making calls or sending emails to potential volunteers.
- Conducting information sessions for interested individuals.
- Interviewing and screening potential volunteers.

UP TO 10% OF VIP-SE TIME (AT LEAST 100 HOURS, AND UP TO 170 HOURS MAXIMUM) IS SPENT BUILDING BUSINESS PARTNERSHIPS AND FUNDRAISING CAPACITY.

CAPACITY. Efforts in fundraising will strengthen the Partner Site's connections with the local business community and promote sustainability of the volunteer program.

The resources raised by the AmeriCorps member must directly support our program's service activities (ie, volunteer engagement at your agency). The minimum goal is to raise \$2,000 in combined cash and in-kind donations– but many of our VIP Fellows exceed this goal.

The Fellow's fundraising time may include:

- Meeting with business representatives to build partnerships for one-time or ongoing financial or in-kind support for the volunteer program
- Making requests to individuals for cash or in-kind donations
- Picking up or dropping off donated items for volunteer projects, if needed
- Writing letters and following up with donors to thank them for contributions
- Maintaining relationships built with new donors

10% OF VIP-SE TIME (EXACTLY 170 HOURS) IS SPENT ON MEMBER TRAINING & COACHING. We've developed a training plan to ensure that a hefty 10% of each VIP-SE Fellow's service time is dedicated to building professional skills and abilities, ensuring their success as a VIP-SE Fellow and giving them a leg up in future endeavors. Training and coaching will include participating in:

- Orientation training at the Supervising Organization and Partner Site
- A one-day regional retreat in Winter/Spring 2018
- Volunteer Management and Nonprofit 101 webinar series, culminating in a Volunteer Management Certificate
- Regular in-person, local meetings at your Supervising Organization
- Online training opportunities
- Staff meetings at your Partner Site
- National Days of Service that promote our collective sense of service, such as Martin Luther King, Jr. Day and Global Youth Service Day.
- Other trainings as planned by your supervisor based on your development goals and the needs of the program.



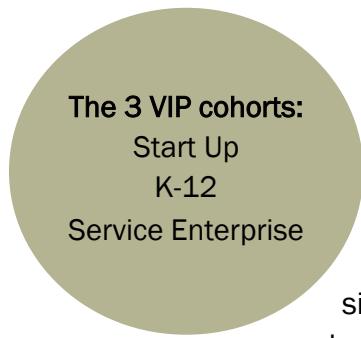
**It is the greatest of all mistakes
to do nothing because you can
only do little - do what you can.**

Sydney Smith



VIP COHORTS: SERVICE ENTERPRISE, START UP & K-12

The Volunteer Infrastructure Project is an umbrella program that supports several different types of community agencies. To better serve our diverse sites, VIP comprises 3 cohorts of Partner Sites and members with common service parameters and a shared goal of building volunteer infrastructure to help Partner Sites better meet community needs.



The Napa County Office of Education is funded in two separate grants for VIP that are administered by California Volunteers and sponsored by the Corporation for National and Community Service. These programs are known as the Volunteer Infrastructure Project (VIP) and Volunteer Infrastructure Project - Service Enterprise (VIP SE). VIP Start Up and VIP K-12 cohort sites are a part of the VIP grant. Those Partner Sites working toward or who are Service Enterprise accredited are a part of the VIP SE grant.

VIP COHORTS

VIP START UP COHORT

Partner Sites in the VIP Start Up cohort include diverse nonprofit and government agencies that are dedicated to building up their volunteer program. VIP Start Up is designed for established agencies with new or unstructured volunteer programs, or that are looking to make significant expansion of an existing volunteer program. The process of building a volunteer program structure can take several years depending on an agency's circumstances – so some VIP Start Up sites are participating in the program for the first time, and others have been working on building up their volunteer program for several years.

AmeriCorps VIP Fellows at Start Up sites strive to grow the agency's volunteer program based on the agency's needs as defined by the Volunteer Capacity Assessment.

VIP K-12 COHORT

Partner Sites in the VIP K-12 cohort include schools, school districts, county offices of education, and some nonprofit agencies that operate on school campuses. Like VIP Start Up Partner Sites, most VIP K-12 sites have new or unstructured volunteer programs. These agencies face unique challenges to incorporating volunteers into the school setting, including complex organizational structures, complicated communication systems, and heightened concerns over volunteer screening and training. VIP K-12 is designed to help address these challenges.

AmeriCorps VIP Fellows at K-12 sites strive to grow the agency's volunteer program based on the agency's needs as defined by the Volunteer Capacity Assessment (much like Fellows at Start Up Sites). CalSERVES also provides these members with additional resources for navigating the world of volunteering in schools.

VIP SERVICE ENTERPRISE COHORT

Partner Sites in the VIP Service Enterprise cohort are nonprofit and government agencies that have made a commitment to pursue Service Enterprise principles. The Points of Light Service Enterprise Initiative (SEI) offers an innovative approach to strengthen nonprofit capacity by integrating volunteer efforts into the culture and structure of the whole organization. Based on research of highly effective service agencies, SEI trains executive and leadership staff and provides an assessment, consultation, and certification process for participating agencies.

AmeriCorps VIP Fellows at Service Enterprise sites strive to grow the agency's volunteer program with a special focus on assisting the agency's efforts in achieving and maintaining Service Enterprise Certification. VIP Service Enterprise Fellows (VIP-SE Fellows) address areas of need defined by the Volunteer Capacity Assessment, and additionally focus on initiatives within the agency related to incorporating Service Enterprise principles.

YOUR AGENCY'S COHORT

The main way that the cohort structure affects your agency is through the type of support that we at CalSERVES offer to your AmeriCorps VIP-SE Fellow. In addition to meeting regularly with the local team of AmeriCorps VIP Fellows (regardless of the team members' cohorts), CalSERVES offers opportunities for members to gain specialized training and networking designed around their designated cohort.

Most cohort-specific support happens through each VIP-SE Fellow's monthly conference webinars with other members in their cohort from around California. These webinars will provide an important place of connection, networking, and learning. For more information on cohort webinars, see the VIP FELLOW TRAINING section of this handbook.

In addition to the monthly webinars, Fellows are encouraged to connect with those in their cohort as needed to gain additional insight and support in serving your agency.

HOW YOUR VIP-SE FELLOW BUILD A QUALITY VOLUNTEER PROGRAM: VIP Volunteer Capacity Goals & Service Enterprise Principles

Partner Sites participating in VIP – Service Enterprise are agencies dedicated to and heavily invested in building strong, sustainable volunteer programs. In addition to a commitment to grow in the capacity standards established by CalSERVES VIP, your agency has also made a commitment to pursue certification as a Points of Light Service Enterprise. Where CalSERVES VIP establishes capacity indicators of the volunteer program itself, Service Enterprise applies research-proven principles to the agency's operations as a whole, engaging executive-level staff in incorporating best practices and encouraging structural changes that will allow volunteers to be used as an effective strategy for meeting the agency's mission in a cost-effective way.

The VIP-SE Fellow placed at your agency will help to achieve VIP capacity standards *and* to incorporate Service Enterprise principles. Volunteer Management is its own professional field, and there's no way to cover all of the principles of a quality volunteer program and the research behind Service Enterprise in this space. But, read on for a brief overview about each of these strategies for building the volunteer program.

VIP VOLUNTEER CAPACITY STANDARDS

At CalSERVES VIP, we're in the business of building effective volunteer programs. We've learned from partnering with hundreds of community service organizations and volunteer management experts what we believe are the key areas organizations must address and systems that must be in place to ensure quality, sustainable volunteer programming. In fact, we're in the process of externally validating our concepts on effective volunteer infrastructure.

There are many elements that make up a strong volunteer program. From creating meaningful volunteer roles, to marketing those roles, tracking volunteers, managing them, and more – a well-engineered volunteer program is a system that encompasses volunteer engagement at every level of the organization from onboarding through the end of a volunteer's service. Here are the main pillars that we've found make for a strong volunteer program structure:

- **AN ORGANIZATIONAL STRUCTURE AND CULTURE THAT SUPPORTS VOLUNTEER INVOLVEMENT**
- **ALLOCATED RESOURCES TO APPROPRIATELY SUPPORT THE VOLUNTEER PROGRAM**
- **COMMUNITY/OUTSIDE PARTNERSHIPS THAT SUPPORT VOLUNTEER EFFORTS**
- **RECRUITMENT AND OUTREACH STRATEGY THAT EFFECTIVELY FILLS IDENTIFIED VOLUNTEER NEEDS**

- VOLUNTEER PROGRAM POLICIES UTILIZE BEST PRACTICES IN HUMAN RESOURCES-RELATED TOPICS
- FULLY DEVELOPED VOLUNTEER ROLES, INCLUDING LEADERSHIP OPPORTUNITIES AND ROLES FOR SKILLS-BASED VOLUNTEERS. A skills-based volunteer is someone with outside training or specialized skills in the area in which they are serving.
- VOLUNTEER SCREENING PROCESS THAT MATCHES VOLUNTEERS WITH APPROPRIATE ROLES
- A COMPLETE VOLUNTEER TRAINING PLAN
- CLEAR ROLES FOR STAFF MEMBERS AND VOLUNTEERS IN THE SUPERVISION OF VOLUNTEERS
- EFFECTIVE WORKING/TEAM RELATIONSHIPS BUILT BETWEEN VOLUNTEERS AND STAFF
- RECOGNITION AND RETENTION STRATEGIES THAT KEEP VOLUNTEERS ENGAGED
- A SYSTEM TO RECEIVE, ANALYZE, AND INCORPORATE VOLUNTEER FEEDBACK
- ACCURATE VOLUNTEER TRACKING AND RECORDING SYSTEMS

Guided by the specific indicators on the Volunteer Capacity Assessment, you and your VIP-SE Fellow will work towards putting these pillars and best practices in place over the year of AmeriCorps service.



POINTS OF LIGHT SERVICE ENTERPRISE INITIATIVE*

The Enterprise Initiative (SEI) is a national initiative led by Points of Light (and unaffiliated with CalSERVES). SEI offers an innovative approach to strengthen nonprofit capacity by integrating volunteer efforts into

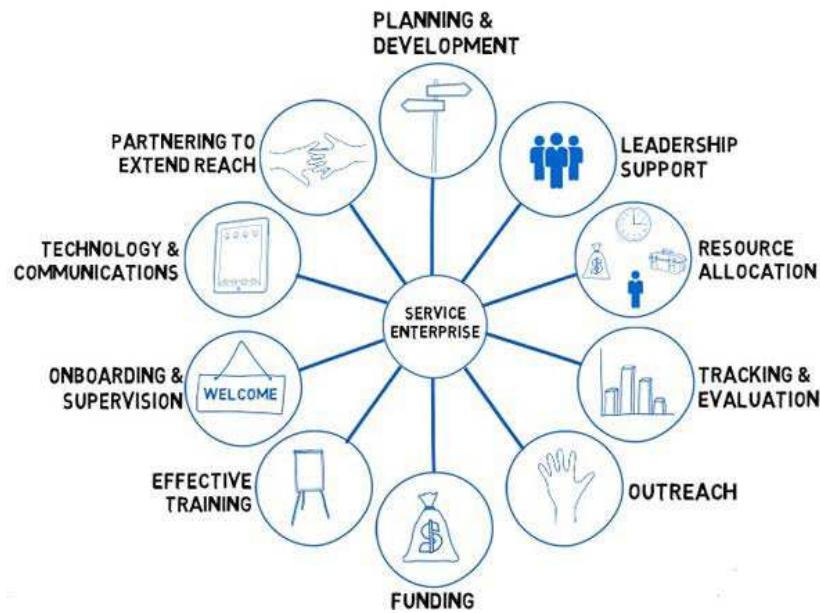
the culture and structure of the whole organization. Based on research of highly effective service agencies, SEI trains executive and leadership staff and provides an assessment, consultation, and certification process for participating agencies.

According to SEI:

“Research conducted by TCC Group and Deloitte demonstrates that nonprofits operating as Service Enterprises outperform peer organizations on all measures of organizational capacity thereby allowing these nonprofits to more effectively address community needs and operate at almost half the median budget. When an organization leverages volunteers and achieves an effective volunteer management model, not only do they lead and manage their organizations better, but they are also significantly more adaptable, sustainable and better resourced to do their work, and therefore able to sustainably go to scale.”

- SEI website: <http://www.pointsoflight.org/service-enterprise-initiative/about>

That research conducted by Deloitte identified ten characteristics as critical practices for nonprofit Service Enterprises:



SEI is designed to help participating agencies create a culture of volunteerism through change management and implementation of the ten practices above. SEI helps agencies to:

- Build capacity by engaging volunteers throughout the organization
- Engage senior leadership from beginning of process
- Measure accurately organizational readiness using a statistically valid, research based assessment
- Receive training, coaching and certification
- Connect with peers across the nation with ongoing training and virtual solutions
- Gain experience through cross-sector learning through peer group cohorts

If your agency has already participated in SEI, you and your staff team are already very familiar with Service Enterprise concepts and the ongoing work required to make the cultural changes promoted by the program.

If your agency has made the commitment to pursue SEI but has not yet begun the training, you can find more information on Service Enterprise via these links:

Service Enterprise information on the Points of Light website:
<http://www.pointsoflight.org/service-enterprise-initiative>

Service Enterprise introduction video on YouTube:
<https://www.youtube.com/watch?v=xvS09oreIM4>

SERVICE ENTERPRISE & YOUR VIP-SE FELLOW

A main goal of the VIP-SE Fellow's service is to assist your agency in achieving Service Enterprise principles. A VIP-SE Fellow may help at any stage of the Service Enterprise process – whether your agency is just preparing and applying to take part in SEI, participating in training and consulting services from your local Service Enterprise hub, applying for certification, or continuing to promote Service Enterprise change and principles after certification.

A central principle of Service Enterprise is leadership support and change across the agency – so your VIP-SE Fellow will not be able to make significant progress towards SE principles on their own. However, with support and guidance from you and other leaders at your agency, the VIP-SE Fellow can assist in carrying out many of the vital and time-consuming projects of a transforming program. Each VIP-SE Fellow's projects around Service Enterprise vary from agency to agency based on need and place in the process, but some ideas of ways that VIP-SE Fellows can help include:

- Incorporating technology in working with volunteers
- Creating systems to evaluate and track volunteer activity and impact
- Creating comprehensive orientation and training programs for volunteers
- Training staff and volunteer leaders in effective volunteer supervision
- Building partnerships to extend outreach
- Other tasks on your agency's Service Enterprise Action Plan

Be sure to share your current Service Enterprise progress with your VIP-SE Fellow, including SEI training materials, your agency's action plan, and any materials or systems developed as a part of the process.

**Points of Light is not a sponsor or affiliate of CalSERVES or VIP, but has generously granted us permission to use the Service Enterprise (SE) name to describe the VIP Service Enterprise program. CalSERVES does not provide SE training or consulting services. CalSERVES offers VIP Service Enterprise as an avenue to engage AmeriCorps members in service to assist agencies committed to achieving and maintaining SE certification.*

IN SUMMARY

VIP-SE Fellows come to the program with varying levels of prior experience and education, but all will spend their 11-month service term learning more about Volunteer Management, the Service Enterprise Initiative, and how they can apply what they learn at your organization. They also will rely on their AmeriCorps team leader and Supervising Organization for support and wisdom in addressing and building the volunteer systems your organization needs.

VIP LINGO

Every organization has a collection of favorite buzz words, statistics, and illustrative anecdotes – and we’re no different. Use this guide to decode our program language and share the work that you and your AmeriCorps member are doing.

VIP-SE Fellows: Full-time AmeriCorps members who serve with the Volunteer Infrastructure Project – Service Enterprise (VIP-SE)

Service/Serve: describes what AmeriCorps members do in their AmeriCorps assignments. Distinct from “work” or a “job.”

“The domestic Peace Corps”: a common way we explain the nature of AmeriCorps to those unfamiliar. It may not be a perfect parallel, but it’s a helpful phrase that conveys the idea of dedicated, full-time volunteer service provided by AmeriCorps members.

“High-need children and families”: our program serves diverse populations. This is an umbrella term we use to describe VIP-SE service recipients. CalSERVES is a program of the Napa County Office of Education, and we strive through all of our work to partner with agencies whose work benefits children and families.

“Volunteer Infrastructure”: the umbrella term we use to describe the complex web of systems, structures, policies, plans, and details that comprise all that is needed to run a volunteer program.

“Service Enterprise”: The Service Enterprise Initiative is a national initiative led by Points of Light with the goal of strengthening the capacity of nonprofits to fundamentally leverage volunteers and their skills to address community needs. Service Enterprise utilizes research from Deloitte and TCC Group that identified 10 critical practices of highly effective nonprofits, and helps nonprofits put these practices in place. Local Service Enterprise Hubs help guide agencies (including nonprofit and government organizations) through a Service Enterprise certification process.

“Partner Sites”- abbreviated “PS”: nonprofit, educational, and government service organizations where VIP-SE Fellows build volunteer programs

“Supervising Organizations”- abbreviated “SO”: local hub sites that work with CalSERVES to host a team of AmeriCorps VIP Fellows in their community who are assigned to Partner Sites.

Helpful statistics:

- 180 AmeriCorps VIP Fellows are placed throughout California in about as many service organizations.
- VIP Fellows serve full-time and dedicate 1700 AmeriCorps hours.
- Every VIP Fellow helps a nonprofit or school build a volunteer program, so that the agency can better serve the community.

Example VIP-SE elevator pitch: This is a short way to describe your organization's participation in VIP.

"Our organization is participating in the CalSERVES Volunteer Infrastructure Project to help increase the capacity and effectiveness of our volunteer program. Our AmeriCorps member has committed nearly a year of full-time service to help us achieve Service Enterprise certification and increase our capacity to manage volunteers. With our AmeriCorps member, we're building systems, making plans, and recruiting community members to partner with our organization to better serve [target community] to make sure their [service area] needs are met."



**It is my deepest belief that
only by giving our lives do we
find life.**

Cesar E. Chavez



**The only limit to your impact is
your imagination and
commitment.**

Anthony Robbins



ABOUT AMERICORPS

VIP-SE IS AN AMERICORPS STATE PROGRAM funded in partnership between California Volunteers, the Corporation for National and Community Service, and participating Partner Sites. Your AmeriCorps member is participating in a rich tradition of national service.

OVERVIEW OF AMERICORPS

AmeriCorps programs, sponsored by the Corporation for National and Community Service (CNCS), engage more than 80,000 Americans in intensive service each year at nonprofits, schools, public agencies, and community and faith-based groups across the country.

Across the nation, AmeriCorps programs carry on the American tradition of service that dates back to our nation's founding more than 200 years ago. AmeriCorps programs can be found in every state and territory in the nation, large cities and small towns, tribal reservations, National Parks and inner city schools – just to name a few locations.

AmeriCorps State and National – the branch of AmeriCorps that supports the Volunteer Infrastructure Project - supports a wide range of service programs. Through AmeriCorps State and National, CNCS provides federally-funded grants to a network of local and national organizations and agencies committed to using national service to address critical community needs in education, public safety, health, and the environment.

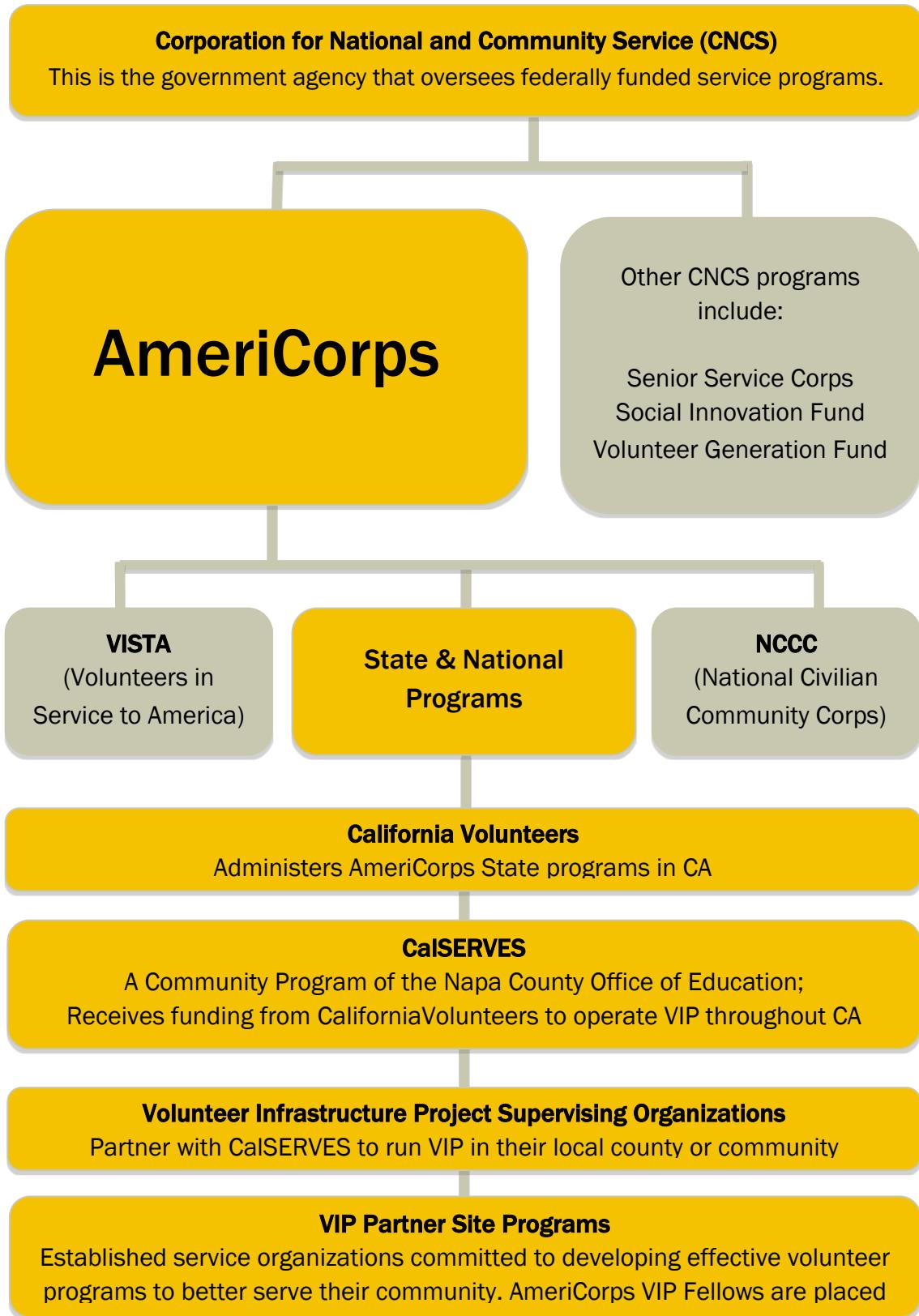


Your organization is one of 15,000 different locations across the nation where AmeriCorps members will serve this year.

Each of these grantee organizations and agencies, including CalSERVES, uses AmeriCorps funding to recruit, place, and supervise thousands of Americans in community service each year. These individuals are referred to as "AmeriCorps members." AmeriCorps grant recipients design service activities for a team of AmeriCorps members serving full- or part-time for one year or during the summer.

In 2016, the ONE MILLIONTH AmeriCorps member was sworn in to service. Since AmeriCorps' founding in 1994, more than 1,000,000 AmeriCorps members have contributed more than 1 billion hours in service across America while tackling pressing problems and mobilizing millions of volunteers for the organizations they serve.

WHERE DOES VIP FIT IN AMERICORPS?



ABOUT AMERICORPS MEMBERS

AmeriCorps programs do more than move communities forward: they serve their AmeriCorps members by providing pathways to opportunity for those entering the workforce. AmeriCorps places thousands of adults into intensive service positions where they learn valuable work skills, earn money for education, and develop an appreciation for citizenship.

Your AmeriCorps member is one of more than 80,000 fellow AmeriCorps members performing a term of service this year.

AmeriCorps State and National programs are open to U.S. citizens, nationals, or lawful permanent resident aliens age 17 and older who have made a commitment to serve their communities and country. Some have college degrees; others have completed high school or are earning a GED. They reflect the diversity of America in age, ethnicity, education, race, gender, and religion.

Full-time AmeriCorps State and National members are given a living allowance, health care, childcare (if they qualify), and become eligible for the Segal AmeriCorps Education Award upon successful completion of the program.

Every AmeriCorps member takes the **AMERICORPS PLEDGE**. The pledge represents the commitment each member has taken to serve in the current year and beyond.

The AmeriCorps pledge:

I will get things done for America—to make our people safer, smarter, and healthier.

I will bring Americans together to strengthen our communities.

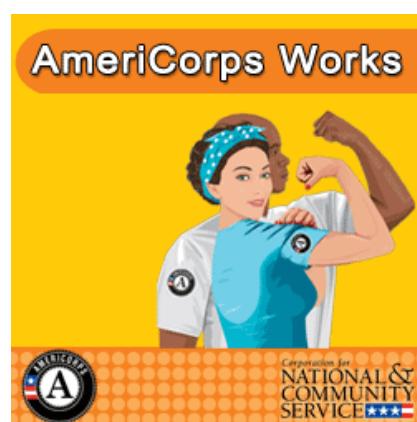
Faced with apathy, I will take action.

Faced with conflict, I will seek common ground.

Faced with adversity, I will persevere.

I will carry this commitment with me this year and beyond.

I am an AmeriCorps member, and I will get things done.



ABOUT AMERICORPS SERVICE

AmeriCorps members have a wide array of service opportunities – VIP-SE is just one of hundreds of programs AmeriCorps members may choose to serve with across the nation.

Depending on the program, members may commit to a full-time, yearlong term of service, or a part-time term of a shorter duration. They may serve with a corps of other members, living in a dorm together and traveling from site to site (like AmeriCorps members with NCCC), or work independently at a school or other project site (like most VIP Fellows).

Regardless of these variations, all AmeriCorps members serve in one or more of the following areas: education, public safety, the environment, and other human needs such as housing or health care. All AmeriCorps members take part in National Days of Service (ask your Supervising Organization for a schedule of service days your AmeriCorps member will take part in during the term of service).



VIP Fellows are full-time AmeriCorps members. Each serves 1700 hours in a California service organization like yours to build the capacity of their Partner Site's volunteer program.

In addition, every AmeriCorps project works towards the four keys goals of AmeriCorps:

1. Getting Things Done
2. Strengthening Communities
3. Encouraging Responsibility
4. Expanding Opportunity

Each AmeriCorps member's service time is directed in tasks and content according to their program's design. Broadly, there are two types of AmeriCorps service efforts: capacity building and direct service. VIP engages AmeriCorps members in capacity building as identified in the WHAT VIP FELLOWS DO section.

Capacity Building includes tasks and activities to create, expand or strengthen systems or processes in order to increase an organization's ability to function effectively and meet its mission. Direct Service is the act of providing services to the identified recipients or clients of a program.

HOW DOES AMERICORPS AFFECT ME AS THE SUPERVISOR?

As any grant award, AmeriCorps funding comes with stipulations and rules for use of funds. Primarily, AmeriCorps policies and regulations pertain to the AmeriCorps member: the use of their time, how they're supervised and placed in service, behavioral expectations, and their representation of the AmeriCorps program. As an AmeriCorps member's supervisor, you should understand:

FEDERAL AMERICORPS FUNDS FROM THE CORPORATION FOR NATIONAL AND COMMUNITY SERVICE ARE ALLOCATED TO CALIFORNIA VOLUNTEERS AND SUPPORT THE WORK OF YOUR AMERICORPS MEMBER. The grant we receive from California Volunteers covers about half of VIP-SE program costs, including member training, CalSERVES VIP-SE staff salaries, program supplies, and a portion of AmeriCorps member benefits. The remainder of program costs are shared by you, the Partner Site (as agreed in the Memorandum of Understanding: the written agreement your organization entered with your Supervising Organization to run the program), Supervising Organizations, and CalSERVES-NCOE.

THERE ARE FEDERAL AMERICORPS TERMS AND CONDITIONS THAT AFFECT YOU AND YOUR AMERICORPS MEMBER. We encourage you to take a look at the AmeriCorps Terms and Conditions, found on www.nationalservice.gov. Along with other program expectations, many highlights of the AmeriCorps Terms and Conditions have been included in the Memorandum of Understanding and in the PARTNER SITE EXPECTATIONS section of this handbook.

CALSERVES AND PARTNER SITES ARE ACCOUNTABLE TO CALIFORNIA VOLUNTEERS, our AmeriCorps State Commission, to meet our goals and administer the program in accordance with AmeriCorps policies.

PROGRAM AUDITS MAY BE CONDUCTED BY CALIFORNIA VOLUNTEERS OR OTHER GOVERNMENT AGENCIES to ensure proper use of federal funds we receive. In the case of an audit, Napa County Office of Education staff or auditors may be in contact to request a site visit or copies of documents related to your AmeriCorps member's service role.

PARTNER SITE ROLE

YOU PLAY AN IMPORTANT ROLE IN OUR PROGRAM'S SUCCESS. Read on for more information about your organization's responsibilities as a part of VIP-SE.

VIP-SE is a partnership between your school or organization, CalSERVES, your Supervising Organization, and the AmeriCorps member. Your participation is key to the success of this program and your AmeriCorps member's experience.

To ensure a quality program that fulfills the responsibilities that come with our funding, we depend on you to operate by the expectations outlined in this section. We're pleased to offer support to help your organization meet its volunteer capacity goals, but we can't operate the program successfully without your active involvement.

Thank you for working with us to make this year of service a success!

YOUR AGENCY'S ELIGIBILITY

Before our partnership began, we verified your organization's eligibility to participate through the Partner Site Application. In order to maintain the program agreement, your organization is expected to continue to meet these basic program requirements:

- Each Partner Site must be a nonprofit (501(c)3) or educational organization (e.g., a school).
- Partner Sites must certify that they are a Drug-Free workplace and must be in compliance with the requirements of federal grant recipients under Section 5153 through 5158 of the Anti-Drug Abuse Act of 1988.
- Services offered by Partner Sites must be offered without regard to a client's age, religion, disability, political affiliation, veteran status, gender, sexual orientation, gender identity, race, ethnicity, or national origin.
- VIP-Service Enterprise Partner Sites must make a commitment to pursue or maintain Service Enterprise Certification through a local Service Enterprise hub. If a VIP-SE Partner Site has not yet applied to participate in SEI, the site must commit to apply and pursue certification by 2018.

PARTNER SITE EXPECTATIONS

Over many years of running AmeriCorps programs, we at CalSERVES have learned important lessons about what makes for a successful term of AmeriCorps service. Based on this experience, VIP-SE has expectations for all program participants to ensure we meet our goals with integrity and professionalism. On the following pages, you'll find our expectations of your participation during the partnership with VIP-SE.

Program mission alignment and outcomes expectations

The express purpose of the VIP-SE program is to support your agency in building an effective volunteer program through incorporation of Service Enterprise principles. Positive program changes within your organization are central to VIP-SE goals. To support the work of the AmeriCorps member and the changes needed to successfully sustain volunteer capacity, Partner Sites are expected to:

- Take active steps in building volunteer capacity and incorporating Service Enterprise principles; the AmeriCorps member will not be able to successfully integrate and build the volunteer program without executive support within the agency and participation by agency staff. Support the work of the AmeriCorps member with organizational management backing, appropriate supervision and infrastructure practices that ensure the adequate implementation of new volunteer infrastructure and systems. This infrastructure includes volunteer tracking systems, staff training in the volunteer program, building of new business partnerships, and others as defined by the Volunteer Capacity Assessment and by the Service Enterprise Initiative.
- Have a willingness to make the cultural changes that are necessary in developing an effective Service Enterprise, including adding volunteer supervision responsibilities to organization staff where appropriate, developing new policies and programs around volunteers, and more. See Service Enterprise materials and the VIP Volunteer Capacity Assessment for a breakdown of the processes involved in creating a fully-developed volunteer program.
- Educate staff and community members as appropriate about the AmeriCorps member's role and responsibilities in the program, and facilitate connections where appropriate (e.g., orient organization staff and current volunteers about AmeriCorps and the roles and responsibilities of any AmeriCorps member(s) assigned to the organization).
- Ensure that the AmeriCorps member's activities always align with program goals and parameters. Partner Sites must assign projects to keep members within the hour percentage requirements (45% of hours spent on volunteer capacity building, 35% on volunteer recruitment, 10% on business partnership and fundraising capacity building, and 10% on training/member development).

Staff time expectations

Your Partner Site's participation in the program must be backed by active staff time. Partner Sites are expected to:

- Designate an appropriate, paid, experienced supervisor that is familiar with the Partner Site's volunteer program and SEI progress to supervise the AmeriCorps member's day-to-day performance. This staff person must submit to a background check initiated by the Supervising Organization that will include checks through the FBI, California DOJ, and NSOPW records. Supervision of the AmeriCorps member will include:
 - Guiding the member to complete tasks outlined in the VIP AmeriCorps Member Work Plan and the agency's Service Enterprise action plan;
 - Conducting weekly or bi-weekly in-person supervision/mentoring meetings with the member;
 - Approving the member's AmeriCorps time sheets; and
 - Completing the AmeriCorps Member Evaluation three times per year and discussing the assessment with the member in person.
- Assign at least one paid staff member to participate in AmeriCorps VIP-SE surveys, assessments, and progress reports. These include:
 - Completing three (3) Volunteer Capacity Assessments for the Partner Site;
 - Completing three (3) Member Evaluations for the AmeriCorps Member;
 - Approving the AmeriCorps member time log two times per month through the designated online portal (OnCorps);
 - Completing bimonthly online Partner Site surveys; and
 - Any additional documentation or reporting needed to meet the requirements of the program funder.
- Assign at least one paid staff member to attend all Partner Site meetings and trainings provided by the Supervising Organization.

AmeriCorps supervision expectations

The Partner Site's AmeriCorps member supervisor will guide the day-to-day work of the member towards program goals. AmeriCorps members (VIP-SE Fellows) serve for a year or less, so the way we supervise these individuals may be different from the way you'd supervise a long-term employee. The designated supervisor is expected to:

- Assign the AmeriCorps member projects that align with the AmeriCorps hours category requirements. Members must spend their 1700 hours of service within the hour percentage requirements: 45% of hours are spent on volunteer development and capacity building, 35% on volunteer recruitment, up to 10%

(between 100 and 170 hours) on business partnership and fundraising capacity building, and exactly 10% (170 hours) on training and member development.

- Guide the member to complete the tasks defined by the VIP Work Plan in order to achieve incomplete areas of volunteer capacity (as defined by the Volunteer Capacity Assessment). Partner Site capacity building assignments must directly impact either: 1) the agency's incomplete indicators on the Volunteer Capacity Assessment; or 2) the agency's ongoing efforts to incorporate Service Enterprise principles.
- Hold VIP Fellows accountable for your agency's goals for recruiting short-term volunteers and long-term volunteers who bring in specialized skills, hold a leadership position in the organization, or come from business partnerships.
- Hold VIP Fellows accountable for raising \$2,000 in in-kind or cash donations for the Partner Site during the term of service.
- Provide projects that offer the member a minimum of 1700 hours of meaningful service before the AmeriCorps end date. The AmeriCorps member should be scheduled consistently for 40-45 hours of service per week. An AmeriCorps member may not be scheduled to serve more than 10 hours in any one day unless an exception is granted in advance by the CalSERVES Program Manager.
- Provide members with appropriate leadership opportunities that will enhance their professional development, including encouraging the member to participate on organization committees, working groups, or boards.
- Notify the Supervising Organization within 24 hours of any problems with the member's performance, including failure to report to the site, unprofessional behavior, etc. If necessary, follow the program's disciplinary procedures.
- Ensure that the AmeriCorps member completes his/her term of service by providing a reasonably comfortable service environment.
- Not hire an AmeriCorps member while he or she is enrolled in AmeriCorps. Doing so undermines the program and would result in immediate cancellation of the program partnership.

AmeriCorps member training expectations

Training of AmeriCorps members is a major component of our program. Partner Sites are expected to:

- Provide members with an orientation and any organization-specific training they will need to carry out their assigned tasks. This includes training the AmeriCorps member in the agency's current status in the Service Enterprise certification process.
- Allow and encourage AmeriCorps members to attend all scheduled AmeriCorps VIP-sponsored events, trainings and service projects. Trainings are typically scheduled during regular business/service hours (Monday–Friday). This includes

full-day orientation and regional retreats, regular meetings with the Supervising Organization, and online trainings. Members must complete 170 hours of training throughout the year and are required to attend all training provided by the program.

- Provide make-up opportunities for Partner Site meetings missed while AmeriCorps members are attending required AmeriCorps trainings. As much as possible, meetings relevant to the AmeriCorps members' work should be scheduled around required AmeriCorps duties.

Impact tracking and reporting expectations

The AmeriCorps VIP-SE program receives public funds, and we strive to demonstrate transparency and accountability in all we do to honor the public tax funds that support our work. Partner Sites provide CalSERVES with important, on-the-ground reporting on program impacts. CalSERVES then shares program-wide results with CaliforniaVolunteers and CNCS. Partner Sites are expected to:

- Complete and submit all CalSERVES reports according to set deadlines in order to ensure timely reporting to the program funder.
- Maintain volunteer tracking data, including sign-in and sign-out records, to document all volunteers recruited, managed, or trained by the AmeriCorps member (volunteers recorded on the member's monthly reports). Volunteer data must be kept for 7 years. To comply with Corporation for National and Community Service reporting standards, your agency's volunteer records must include at a minimum (for the volunteers that the AmeriCorps member reports):
 - Volunteer names;
 - Relevant demographic information (including location of residence);
 - Method of recruitment;
 - Participation in orientation and/or training activities;
 - Planned and actual role(s);
 - Assignment(s) or activities;
 - Start and end dates of service
 - Each volunteer's dates of service; and
 - How many hours each volunteer served on each day of service.
- Allow limited access to volunteer data to the AmeriCorps member, Supervising Organization, and CalSERVES/NCOE Community Programs. AmeriCorps members will need access to the number of volunteers they've recruit and the hours those volunteers have served for their CalSERVES monthly report. Supervising Organizations will need access to spot-check volunteer records for compliance with CNCS standards. Only in the case of a program audit by CNCS or another federal agency, NCOE Community Programs staff may require copies of volunteer records.

Supervising Organization collaboration expectations

Supervising Organizations play a key role in administration of VIP-SE, and you will collaborate with your Supervising Organization throughout the year. Partner Sites are expected to (see next page):

- Enter into a signed agreement with the Supervising Organization, referred to as the Memorandum of Understanding, before each year of program participation. This agreement defines the roles of Partner Sites and Supervising Organization in running the program.
- Assist the Supervising Organization in the recruitment and selection of AmeriCorps member(s). This includes posting the position within the agency and throughout the agency's network, referring interested parties, conducting interviews, and participating in final selection of the AmeriCorps member(s).
- Communicate and collaborate with the Supervising Organization regularly, including sharing any challenges or concerns in a timely manner.

Resource contribution expectations

Most program costs are covered by the AmeriCorps grant, but Partner Sites are required to share part of the program costs. Partner Sites are expected to:

- Provide cash match from non-federal sources as agreed in the Memorandum of Understanding. This covers a portion of the AmeriCorps member's stipend, health benefits, training and coaching, and other administrative costs of the program.
- Provide the member with any resources and tools needed to perform effectively, including adequate workspace and full-time access to a computer and phone.
- Understand the financial implications of an AmeriCorps member dropping out of the program before he or she finishes the term of service. See your Memorandum of Understanding for details.

CalSERVES AmeriCorps branding and communications expectations

CalSERVES, CaliforniaVolunteers, and CNCS all have branding guidelines that affect VIP Partner Sites. We need your help to inform the community about the support AmeriCorps and CalSERVES are providing to your community! Partner Sites are expected to:

- In referring to the VIP Fellow's title, use one of the following: "AmeriCorps VIP-SE Fellow," "Volunteer Service Member," "AmeriCorps Volunteer Services," OR "Volunteer Services, AmeriCorps Member." VIP-SE Fellows *may not* be referred to

as “volunteer coordinators” or any other title not listed above. This includes the AmeriCorps member’s email signature, business cards, press releases, social media, newsletters, and other media coverage.

- Post the “AmeriCorps Serving Here” sign provided by CalSERVES in a visible, public area.
- Mention “AmeriCorps Volunteer Infrastructure Project – Service Enterprise” or “AmeriCorps VIP-SE member” or “AmeriCorps VIP-SE Fellow” in media and correspondence that refers to the work of the AmeriCorps Member and the Partner Site’s volunteer program.

AmeriCorps expectations

Like all other program participants, Partner Sites must adhere to the set policies that apply to all AmeriCorps programs. Partner Sites are expected to:

- Follow all federal AmeriCorps Terms and Conditions.
- Ensure that members are not used to displace any paid employee providing similar services, or to displace any current volunteers providing similar services.
- Not offer any additional salaries or wages to the AmeriCorps member during the term of service, including part-time employment at the Partner Site outside of the AmeriCorps service role.
- Avoid directing AmeriCorps members to perform PROHIBITED ACTIVITIES defined below.

These expectations are also outlined in the Memorandum of Understanding your organization signed at the program outset.

UPHOLDING AMERICORPS MEMBER RIGHTS

Our Partner Sites must uphold basic program tenants that protect the rights of all AmeriCorps members as defined below.

AmeriCorps members have a right to freedom from discrimination.

We are committed to ensuring that no one in our program, from AmeriCorps members to service recipients, faces discrimination or exclusion based on their identity. Participation in all CNCS programs and projects is based on merit and equal opportunity for all. CalSERVES and all organizations participating in the VIP-SE program will select program participants without regard to factors such as race, color, national origin, sex, sexual orientation, religion, age, disability, political affiliation, marital or parental status, military service, or religious, community, or social affiliations.

AmeriCorps members have a right to reasonable accommodation for disabilities.

All AmeriCorps programs furnish reasonable accommodations for the known physical and mental limitations of qualified AmeriCorps members. CalSERVES, Supervising Organizations, and Partner Sites will make reasonable accommodations for qualified individuals with known disabilities, as long as the accommodation does not impose an undue hardship on the program. This policy governs all aspects of the program, including selection, compensation, and access to benefits and training. If your AmeriCorps member has a disability, it is their responsibility to inform their supervisor of their needs so that reasonable accommodations can be made.

AmeriCorps members have a right to freedom from harassment.

Programs participating in CalSERVES VIP-SE do not tolerate harassment of any kind. Harassment includes threatening or insinuating that the refusal to submit to sexual advances will adversely affect admission or program benefits. Harassment may also include conduct such as unwanted sexual flirtation or touches; abusive or degrading language; graphic or suggestive comments; or displaying inappropriate objects or pictures. Any member who believes that he or she has been subject to harassment of any kind, or who has knowledge about harassment of others, should report the harassment to an immediate supervisor, Supervising Organization staff, and/or CalSERVES staff. Any member who is found to have engaged in harassment will be subject to appropriate discipline, up to and including dismissal from AmeriCorps service.

AmeriCorps members are expected to treat others without discrimination or harassment.

Discrimination on the part of fellow AmeriCorps members is not tolerated. Anyone found to be engaging in any type of unlawful or harassing discrimination will be subject to disciplinary action, up to and including dismissal from the program. If you witness a member engaging in discrimination, inform your Supervising Organization immediately.

DRUG FREE WORK POLICY

CalSERVES is a drug free program. It is prohibited for AmeriCorps members or Program staff to manufacture, distribute, dispense, be in possession of, or use any illegal or controlled substance and/or alcohol during participation in any CalSERVES activity including training, working with clients and volunteers, travel to and from any of these activities, and any other activities related to CalSERVES.

YOUR ROLE AS SUPERVISOR

As the designated VIP-SE representative from your organization, **YOU'LL PLAY A VITAL ROLE IN THE AMERICORPS MEMBER'S SUPERVISION.**

You are working on a team with staff at the Supervising Organization (SO) to manage the member's service performance. The SO is considered the AmeriCorps member's primary site, and many aspects of member management will be handled by the SO staff. Their support of the member will include connecting the member to the rest of the local AmeriCorps team, providing training and coaching, helping administer any disciplinary action that's necessary, and handling Human Resource-related concerns.

Day-to-day, however, the Partner Site (PS) supervisor will supervise and work closely with the AmeriCorps member to guide service and hold members accountable for their performance. To promote effective service and fairness across all CalSERVES programs, we've established common supervision procedures as they relate to these core responsibilities of the PS supervisor:

- Preparing for the AmeriCorps member's arrival
- Coaching and training of the member, including in emergency procedures
- Encouraging the member to complete the term of service
- Supervising day-to-day activities of the member
- Addressing member behavior concerns

PREPARING FOR THE AMERICORPS MEMBER'S ARRIVAL

Preparing for the arrival of an AmeriCorps member involves more than just readying the organization, but also helping the individual transition to their new role in the community. Whether they're moving across the country, jumping into a different line of work, moving into the workforce for the first time, or transitioning to living on the tight budget of the AmeriCorps stipend, many of our members are making a big transition in beginning their AmeriCorps service.

Here is a checklist of best practices to make sure your organization is prepared to welcome the AmeriCorps member:

- Utilize the VIP AmeriCorps Year Project Plan Worksheet to make a plan for your AmeriCorps member with clear goals, tasks, and expectations before the term of service begins. If available, utilize your agency's Service Enterprise action plan to guide the member tasks and goals.
- Reach out to the member before their service begins and ask them if there is anything you can do to help their transition to the community. Can you recommend any good resources for low-income housing? Do you know of

cheap places to get furniture or groceries? What activities in the area are free and fun? Share your knowledge of the community and help the member feel at home!

- Prepare workspace for the AmeriCorps member with a desk, computer, telephone, business cards, and an organizational email account. Consider decorating the new space with a welcome banner before the member arrives!
- Make a plan to welcome the AmeriCorps member to your organization's team. Consider throwing a welcome lunch and including the AmeriCorps member in staff meetings and get-togethers.
- Formally introduce the member to the community by introducing them at staff meetings, board meetings, and appropriate community or client gatherings. Consider running an article in a newsletter or on social media to welcome the member.

COACHING AND TRAINING

Many (but not all) of our AmeriCorps members are relatively new to the workforce in general, and many are brand new to the service field. They need our support – from CalSERVES, the Supervising Organization, and from YOU – to successfully make their way in this new environment. You can find our training expectations above. The following are additional tips for guiding your AmeriCorps member to greatness in their role:

- Make a plan of action for the member. Utilize the Member Work Plan and the VIP AmeriCorps Year Project Plan Worksheet you completed in preparing for their arrival. Define goals and tasks they can take to achieve them.
- Set weekly meetings to discuss progress towards program goals, volunteer recruitment, and the member's success.
- Train your AmeriCorps member in the emergency procedures at their service site – make sure they're just as prepared as other staff.
- Mentor your AmeriCorps member by offering your professional advice and insight. Your wisdom and guidance will not only help them perform better this year, it will help them in their next career step.
- Make yourself available to the AmeriCorps member by phone, email, or in person to offer support and answer questions. Remember, your AmeriCorps member is new to the organization, and your insights will make a tremendous impact on their ability to be successful in their role.
- Include AmeriCorps members in staff meetings and trainings to support their knowledge of the organization and the service work your agency does.
- Support the member's training plan by encouraging them to attend all VIP-sponsored trainings and events. Be sure to schedule meetings at the site around these important opportunities for development.

ENCOURAGE YOUR MEMBER TO COMPLETE THE SERVICE COMMITMENT

AmeriCorps members make tremendous sacrifices in order to serve. Many have put family life, career paths, or their education on hold in order to spend this year serving the community. Some members face homesickness, challenges in transitioning to life in a new community, and struggles related to adjusting to a new work environment. All will inevitably face the challenge of living on the tight budget allowed with the AmeriCorps stipend.

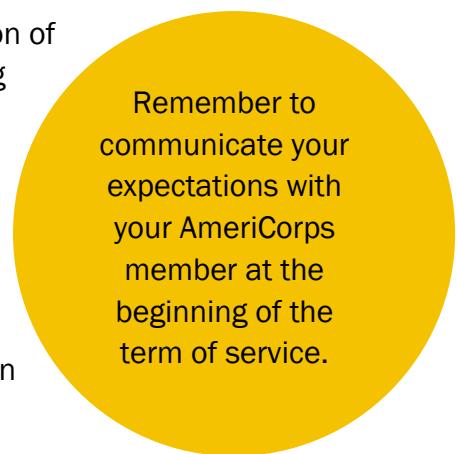
Our responsibility as supervisors is to make reasonable efforts to help the AmeriCorps member feel welcome in their new community, as a part of their local AmeriCorps cohort, and as a member of your staff team. Here are a few suggestions on supporting your AmeriCorps member to make it through any challenges ahead.

- Appreciate your member formally and informally, through verbal expressions of thanks, notes of gratitude, or small gifts.
- Connect your AmeriCorps member with resources that can help stretch their budget. Let them know of cheap places to eat, shop, find housing, and connect them with other local resources.
- If it seems like the AmeriCorps member is losing morale, contact the Supervising Organization to make a plan of action to ensure the member is being offered all the support they need.
- If an AmeriCorps member's performance is suffering because of challenges in their personal life, address the performance issues in a caring manner. Listen to the member and offer support and flexibility when needed. Keeping members accountable to their commitments will make sure their year is successful even in the face of challenges.

DAY-TO-DAY SUPERVISION

Basic supervision expectations are found in the previous section of this handbook. The following are additional tips for supervising your AmeriCorps member for success:

- Don't let performance problems go unaddressed. The longer you ignore an issue, the worse it will likely get. As you'll see below, we've set program-wide expectations for every VIP Fellow. In addition, you can set your own expectations in the beginning. After you've set your expectations, nip problematic behavior in the bud according to the established Disciplinary Action procedure.
- Use the CalSERVES AmeriCorps Fellow Performance Evaluation as an occasion to affirm the areas where you've seen the member excel or grow, and coach members in areas where they show room for improvement.



Remember to communicate your expectations with your AmeriCorps member at the beginning of the term of service.

CalSERVES and AmeriCorps Expectations for VIP-SE Fellows

CalSERVES has expectations for all VIP-SE Fellows. Our Fellows learn about these expectations in their AmeriCorps member contract, in their AmeriCorps Member Handbook, and during orientation training.

You play a central role in the supervising of the assigned AmeriCorps member in their day-to-day work, and you will hold your AmeriCorps member accountable for abiding by these expectations.

Some of these policies are applicable for all AmeriCorps members across the country, and some are specific to CalSERVES – but all are in place to make the service year successful.

VIP-SE Fellow performance expectations

All VIP-SE Fellows are expected to:

- Utilize service time appropriately by working with consistency and excellence toward program objectives.
- Follow directions from supervisors and adequately perform assigned service duties, including adhering to assigned project deadlines.
- Complete CalSERVES VIP-SE reports thoughtfully and accurately. Reports should be submitted before the established deadlines.
- Participate in three performance reviews given by the supervisor.

VIP-SE Fellow professional conduct expectations

All VIP-SE Fellows are expected to:

- Perform only service-related activities during scheduled service hours. This includes refraining from personal internet surfing, reading, texting, phone calls, and emails while serving.
- Dress appropriately, as defined by the dress code of the service site or the program. This includes wearing an AmeriCorps shirt or the AmeriCorps pin at all times while serving.
- Honor the policies and procedures of the assigned Partner Site.
- Represent AmeriCorps, VIP-SE, and the Partner Site positively and appropriately according to any applicable organizational guidelines.
- Take responsibility for one's own actions.
- Refrain from use of abusive language, yelling, fighting, aggressive speech, insubordination or lying in all communication, including verbal, written, and electronic communication.
- Refrain from inappropriate behavior, including harassment and discrimination.
- Be respectful of Partner Site property. Members should not engage in theft or careless damage of program or service site property.

VIP-SE Fellow interpersonal and team expectations

All VIP-SE Fellows are expected to:

- Develop and maintain positive and productive relationships with Program staff, Partner Site staff, fellow AmeriCorps members, and the community.
- Demonstrate mutual respect towards others.
- Refrain from spreading rumors and gossip about other team members, staff, or clients.
- Maintain confidentiality.
- Approach conflict with respect, utilizing best practices in conflict resolution. Members should reach out to a supervisor or Program staff if conflicts persist or interfere with service activities.

VIP-SE Fellow attendance expectations

All VIP-SE Fellows are expected to:

- Serve a scheduled number of hours per week for the period committed as determined by the Program and Partner Site.
- Arrive on time for all service activities and trainings.
- Call the service site in advance of the scheduled arrival time (by 8 AM that morning) if they cannot attend or will be late for any reason.
- Ask for the supervisor's permission to leave the service site during scheduled service hours.
- Take a 30-minute break (lunch) when serving more than 6 hours in one day. This time does not count towards AmeriCorps hours, and should be logged as a lunch break on the time sheet.
- Participate in 2 or more designated National Service Days.
- Participate in training and apply new knowledge to their service.
- Attend (or makeup) required training events and team meetings in the service term.
- Meet the requirements of the service contract. As long as hour requirements are met, members may utilize up to 5 personal days ("time off") during the service term. A completed Time Off Request form must be submitted to the supervisor at least two weeks in advance of any desired time off.
- Electronic time sheets (via OnCorps) must be submitted on time and accurately reflect service activities from the designated time period.
- Not have consecutive unexcused absences or tardiness that exceed 3 days (without a doctor's note), including failure to notify a supervisor when unable to report for community service activities.

VIP-SE Fellow client and community safety expectations

All VIP-SE Fellows are expected to:

- Report to service free of the influence of drugs and alcohol.

- Maintain a substance-free service environment. Members do not engage in alcohol or drug use during service hours.
- Avoid any contact with minor service recipients outside the parameters of the program.
- Refrain from transporting passengers in their own private vehicle during hours they are serving as an AmeriCorps member, unless the passenger is an AmeriCorps VIP-SE or VIP Fellow or an employee of the Program.
- Inform a supervisor if they witness a significant issue with a service recipient, volunteer, or staff person.

AmeriCorps responsibilities

The basic responsibilities listed below are expected of all AmeriCorps members across the country, and are in addition to our program expectations.

- To earn an education award, AmeriCorps members must *satisfactorily* complete the program requirements and the full term of service: serving from the start date to the end date in their contract, for at least 1,700 hours total. *Satisfactory* service includes attendance, compliance with applicable rules, a positive attitude, quality service, and respect toward others in the program and in the community.
- Members must wear an AmeriCorps shirt or the AmeriCorps pin at all times while serving.
- Members must uphold the ethic of service.

AmeriCorps prohibited activities

AmeriCorps is a national service initiative designed to serve community needs present in communities across all beliefs, political leanings, race, gender, and abilities. AmeriCorps is a politically-neutral and religiously-neutral program that assists those in need, whatever their affiliation.

As private citizens, AmeriCorps members may participate in the otherwise legal prohibited activities on their own time, at their own expense, & at their own initiative. Any perceived association with CalSERVES AmeriCorps while engaging in these activities should be avoided, including wearing of program logos.

There are certain activities that AmeriCorps members and staff members of AmeriCorps programs should not engage in as part of their service with AmeriCorps or while representing AmeriCorps. These activities are called Prohibited Activities. Performing any of the activities below during AmeriCorps service or while wearing AmeriCorps gear will result in disciplinary actions for AmeriCorps members.

AmeriCorps members may not:

- Engage in any effort to influence legislation, including state or local ballot initiatives or lobbying for the AmeriCorps program; for example, a member may not organize a letter-writing campaign to Congress;

- Engage in partisan political activities or other activities designed to influence the outcome of an election to any public office;
- Organize or take part in political demonstrations or rallies;
- Organize or participate in protests, petitions, boycotts, or strikes;
- Assist, promote, or deter union organizing;
- Impair existing contracts for services or collective bargaining agreements;
- Participate in, or endorse, events or activities that are likely to include advocacy for or against political parties, political platforms, political candidates, proposed legislation, or elected officials; for example, members may not print politically charged articles in a Corporation-funded newsletter;
- Perform clerical work, research, or fundraising, except if incidental to the specific service activities;
- Engage in religious instruction, conduct worship services, provide instruction as part of a program that includes mandatory religious instruction or worship, construct or operate facilities devoted to religious instruction or worship, maintain facilities primarily or inherently devoted to religious instruction or worship, or engage in any form of religious proselytization;
- Provide a direct benefit to a for-profit entity, a nonprofit entity that fails to comply with the restrictions contained in section 501(c) of the U.S. Code Title 26, a labor union, a partisan political organization, voter registration drives, or, in general, an organization engaged in the religious activities described in the preceding bullet.
- Provide abortion services or referrals for receipt of such services.
- Conduct a voter registration drive or use CNCS funds to conduct a voter registration drive.
- Take part in any activity that is illegal under local, state, or federal law.
- Take part in activities that pose a significant safety risk to others.
- Harass service site staff, fellow members, AmeriCorps personnel or other agency clients.
- Engage in such other activities as CNCS may prohibit.
- 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.

There are also several activities that the Partner Site and Program may not assign the member to do, such as:

- Any of the prohibited activities mentioned above;
- Activities that pose a significant risk to members or other participants;
- Assignments that displace employees; and
- Internships with for-profit businesses as part of the education and training component of the program.

CNCS has additional restrictions for AmeriCorps members who engage in fundraising. Regarding your fundraising activities, VIP-SE Fellows may raise resources directly in support of our program's service activities (ie, volunteer engagement at your agency). AmeriCorps members may not:

- Raise funds for living allowances or for an organization's general (as opposed to project) operating expenses or endowment;
- Write a grant application to the Corporation or to any other Federal agency; or
- Spend more than ten percent of the originally agreed-upon term of service performing allowed fundraising 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 so.

Partner Site expectations for VIP Fellows

Partner Sites may add additional information regarding specific responsibilities expected by the organization. Be sure to communicate any additional expectations at the start of the service term with both the AmeriCorps member and the Supervising Organization.

ADDRESSING BEHAVIOR CONCERNS – DISCIPLINARY PROCEDURE

AmeriCorps and CalSERVES policies are in place to ensure the AmeriCorps member's safety, our community's safety, and success during the term of service. Participation in our program depends on a member's ability to perform service with integrity and in adherence to our program policies.

It is important to address misconduct from members as soon as possible. Members who violate CalSERVES VIP-SE expectations or AmeriCorps rules will be subject to Disciplinary Action and may be put on suspension or released from service.

If you notice AmeriCorps member misconduct, contact your Supervising Organization (SO) immediately. Staff at the Supervising Organization will walk you through appropriate steps according to the program's Disciplinary Procedure to address the situation.

Disciplinary Action and Program Dismissal (Release “For Cause”)

For violating any stated rules in the AmeriCorps contract, or engaging in any other inappropriate behavior, the Program will do the following:

- For the member's first offense, an appropriate staff person (normally from the SO or PS) will issue a written warning to the member.

- For the member's second offense, an appropriate staff person will issue a written warning and reprimand the member.
- For the third offense, the Program Director may release the member "for cause" (i.e., dismiss the member from the program).

In some serious cases, the member may be released for cause on the first or second offense. See below for more information.

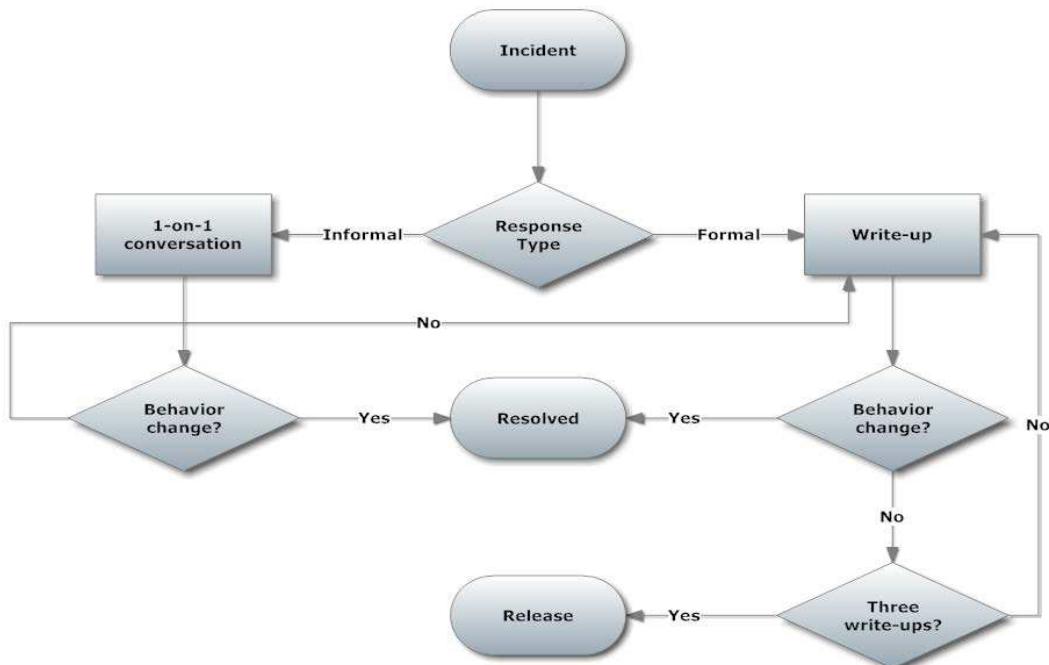
When an AmeriCorps member is released for cause, the member will no longer receive program benefits (including remaining balance of the living stipend, healthcare, and childcare). Members released for cause are not eligible to receive any portion of the education award.

Issuing Verbal and Written Warnings

Before delivering a verbal or written warning to an AmeriCorps member, contact your SO. The SO plays a central role in member management and needs to know about performance issues as they arise.

Deciding the best course of action is the first step in addressing policy violations. Informal, verbal warnings may be appropriate for policy violations that are minor, uncharacteristic of the member's behavior, or for the member's first violation. Written warnings (also referred to as "write-ups") should be issued in many circumstances where program policy is broken.

The course of action should be agreed upon by the PS supervisor and the SO supervisor. Work together with your SO, and use the following chart to determine the appropriate response:



If an **informal, verbal response** is chosen, follow these steps:

1. Request to meet with the member 1-on-1 in a private setting. Only the AmeriCorps member and one supervisor should be present in most circumstances, though both the PS and SO supervisors should be present in some circumstances – discuss this with your SO.
2. Upon meeting with the member, express the specific actions observed that break program policies. Be as specific as possible, including dates and times that the policy violation was observed.
3. Present the CalSERVES, AmeriCorps or Partner Site policy that was broken. Show written evidence of the policy as shown in the AmeriCorps Member Handbook, AmeriCorps member contract, or Partner Site policy document.
4. Set expectations for corrected behavior.
5. Inform member of consequences of continued policy infractions. The consequence is normally a formal, written warning (“write-up”).

If a **formal, written response** is chosen, follow these steps:

1. Request to meet with the member 1-on-1 in a private setting. Only the AmeriCorps member and one supervisor should be present in most circumstances, though both the PS and SO supervisors should be present in some circumstances – discuss this with your SO.
2. Work with the SO supervisor to complete the AmeriCorps Disciplinary Action Form (your SO can provide this form). This will include a written account of policy violations observed.
3. Upon meeting with the member, express the specific actions observed that break program policies. Be as specific as possible, including dates and times that the policy violation was observed.
4. Present the CalSERVES, AmeriCorps, or Partner Site policy that was broken. Show written evidence of the policy as shown in the AmeriCorps Member Handbook, AmeriCorps member contract, or Partner Site policy document.
5. Inform member of consequences of continued policy infractions. The consequence is normally an additional formal, written warning or “write-up,” or dismissal from the program after 3 written warnings.
6. Present the member with a written copy of the Disciplinary Action form to keep.
7. Have the member and supervisor sign a copy of the Disciplinary Action form, and send this copy to the SO and CalSERVES within 24 hours of completing the form.
8. (OPTIONAL) Have the member create a written action plan to explain the steps they will take to prevent future policy infractions.

Grounds for Immediate Suspension or Release for Cause

Normally, AmeriCorps members should be given ample opportunity to correct policy-breaking behavior before consideration for release from the program; however, there

are some cases where failure to follow our program policies poses immediate threat to others' safety. In these cases, an AmeriCorps member will be either suspended or released for cause immediately, rather than proceeding through a course of written warnings. The following actions warrant immediate release from service:

- Consuming alcoholic beverages during the performance of service activities.
- Being under the influence of alcohol or any illegal drugs during the performance of service activities.
- Possessing or using any illegal drugs during the term of service.
- Being charged with a violent felony, or the sale or distribution of a controlled substance. (If the member is found not guilty or the charge is dismissed, the member may resume his/her term-of-service. The member, however, will not receive back living allowances or credit for any service hours missed.)
- Being convicted of a first offense of possession of a controlled substance. (If the member, however, demonstrates that s/he has enrolled in an approved drug rehabilitation program, the member may resume his/her term-of-service. The member will not receive back living allowances or credit for any service hours missed.)
- Engaging in activity that may physically or emotionally damage other members of the program or members of the community.
- Failing to notify the Program of any criminal arrest or conviction that occurs during the term-of-service.
- Having any contact with minor age children involved in AmeriCorps Service Programs during non-service hours, unless the Program, prior to signing of the contract, gives special written permission.
- Transporting minor-aged children in their own private vehicle during hours they are serving as an AmeriCorps member.
- A request from the Partner Site that the member be removed from the site placement.
- Abandonment of service (failing to report for service 3 consecutive days without notification to supervisor, 'walking off' from scheduled service without notice to supervisor, etc.).
- Committing a third offense that calls for disciplinary action.
- Members may be suspended or released for cause for other inappropriate actions, depending on the circumstance.

If you believe an AmeriCorps member has behaved in a way that constitutes grounds for immediate suspension or release for cause, contact your SO immediately.

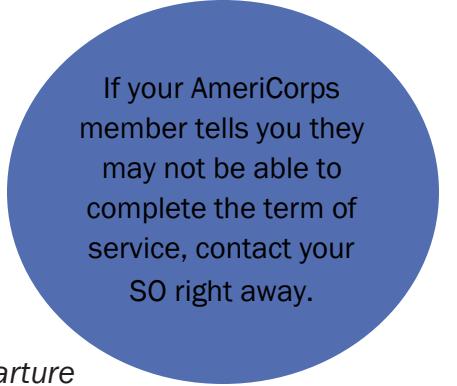
IF THE UNEXPECTED HAPPENS: SERVICE SUSPENSION AND EARLY RELEASE FOR COMPELLING PERSONAL CIRCUMSTANCES

All full-time AmeriCorps members make a commitment to serve a 1700-hour term of service. But sometimes when tragedy strikes or unforeseeable circumstances arise, a member may need to pause the term of service to attend to emergency matters, or end their term of service early. AmeriCorps has defined procedures to follow when these circumstances arise.

Compelling Personal Circumstances

“Compelling personal circumstances” are emergency or unforeseen circumstances that prevent any member from fulfilling their AmeriCorps service obligation. These circumstances are determined by AmeriCorps policies and include (but are not limited to):

- Disability or serious illness that makes completing the term impossible;
- A serious injury, illness, or death of a family member which makes completing the term unreasonably difficult or impossible;
- The member has military service obligations;
- The member has accepted an opportunity to make the transition from welfare to work (*The member solely being on CalFRESH or receiving state or federal cash aid does not constitute a reason for early exit under personal compelling circumstances. If the member is enrolled in a program that includes in its approved objectives the promotion of employment among its members, the program may deem his or her early departure from a program as a compelling personal circumstance.*);
- Other unforeseeable circumstance beyond the members’ control that make it impossible or unreasonably difficult for the member to complete the term of service, such as natural disasters.



If your AmeriCorps member tells you they may not be able to complete the term of service, contact your SO right away.

Not all situations qualify as “compelling personal circumstances.” So far as circumstances are within the member’s control, every member is expected to complete the AmeriCorps service term and provide committed service to communities in need. The following are **NOT** considered compelling personal circumstances:

- Leaving to enroll in school.
- Leaving to obtain a job (other than in moving from welfare to work under the conditions listed above).
- Dissatisfaction with the program.

Members who do not complete their AmeriCorps contract under these circumstances, or who leave their service contract incomplete for any reason other

than officially determined “compelling personal circumstances” may not be eligible to receive the education award or return to National Service.

AmeriCorps members should contact their SO to begin the process of requesting release for compelling personal circumstances. CalSERVES AmeriCorps VIP reserves the right to accept or deny a request for early release or suspension of service for compelling personal circumstances based on the established criteria.

WHAT HAPPENS IF OUR AMERICORPS MEMBER LEAVES?

In the event that the AmeriCorps member drops out of the program before he or she has completed 30% of the service term, every effort will be made to replace the member.

Member costs are nontransferable. If a replacement is made for the AmeriCorps member, the PS will be responsible for covering any additional member costs. For example, if the initial member served 20% of his/her service term, the PS would be responsible for paying 20% of the agreed cash match already spent on the member who is leaving plus the second member’s full cash match.

If no replacement is made and the AmeriCorps member has served less than 30% of his/her service term, the PS will be reimbursed for the remaining portion of the match for the member leaving. For instance, if the member has served 10% of his/her service term and is not replaced, the PS would be reimbursed the remaining 90% of match paid.

If the AmeriCorps member has served more than 30% of his/her term of service and drops out of the program, no replacement can be made, and the Partner Site will not be reimbursed for the member cost portion of the match paid.

The administrative portion of the match paid will not be reimbursed if a member leaves service early. Refer to your organization’s Memorandum of Understanding or contact your SO for the amount of member and administrative costs paid.



Darkness cannot drive out darkness; only light can do that. Hate cannot drive out hate; only love can do that.

Martin Luther King Jr.



VIP-SE FELLOW TRAINING AND COACHING

OUR VIP-SE FELLOWS TAKE PART IN 170 HOURS OF TRAINING AND COACHING
to bolster volunteer management skills and provide tools for future careers.

CALSERVES TRAINING PHILOSOPHY

Our AmeriCorps members are as diverse as the populations we serve, coming to us with all types of learning styles, different levels of education and work experience, and every culture and background. To create a strategy that meets the needs of diverse members, we've crafted a training plan that incorporates a variety of training methods and flexibility to meet individual needs. Every CalSERVES program incorporates training opportunities for AmeriCorps members that include a mix of live and online delivery; small group, large group, and individual formats; coaching from professional staff and seminars with qualified speakers; and flexibility to meet each individual's and Partner Site's needs most effectively.

TRAINING GOALS

Well-designed training plays an important role in program delivery and the professional development of our AmeriCorps members. CalSERVES programs offer training to achieve two main goals:

1. Training and coaching offer the opportunity for our AmeriCorps members to **become more successful in building volunteer programs**. As the main program deliverers, AmeriCorps members need training to be effective and achieve the goal of building strong volunteer programs for our Partners.
2. Whether new to the workforce or well into it, we aim to offer our AmeriCorps members an **experience that will give them a leg up in their future careers**. AmeriCorps members make sacrifices for our community, and offering a plan for their professional development is one way we repay them for their service.

TRAINING TIME AND DELIVERABLES

Professional development of our members is so important to us that we've made it one of our grant deliverables! We expect our **AmeriCorps members to grow by 20%** in their professional skills over the year of service. We measure that growth with our AmeriCorps Member Evaluations (Member Eval).

To make sure our members have the opportunity to learn, grow, and meet our development goal, we've committed that **each member will spend 170 hours** of their AmeriCorps term in coaching and training.

TRAININGS OFFERED BY CALSERVES AND THE SO

Trainings offered by CalSERVES or your SO will include:

- live, local trainings,
- in-person regional retreats once annually,
- Volunteer Management and Foundations of Nonprofit 101 webinar series, culminating in a Volunteer Management Certificate;
- AmeriCorps member local, statewide, and peer group meetings,
- online trainings,
- coaching and check-in opportunities,
- Partner Site meetings and trainings, and
- National Days of Service that encourage a love of service.



Ask your SO for details on your AmeriCorps member's training plan and training dates for this year of service.

TRAININGS OFFERED BY YOU, THE PARTNER SITE

While CalSERVES and the SO offer much of each AmeriCorps member's 170 hours of training, you play an important role in meeting the individual training needs for your organization and your member. The following are examples of training opportunities you will offer your AmeriCorps member this year (also referenced in the AmeriCorps member training expectations section):

- Regular, weekly or bi-weekly check-in meetings. These meetings are not only an opportunity for supervision, but serve as a time to offer coaching, mentoring, and direction to the member.
- Participation in staff meetings & training and SEI-related meetings & training. Including the AmeriCorps member in staff team training and meeting opportunities gives them insight into the interworking of your organization and exposes them to the insight and work of your professional staff.
- Your site may choose to send your AmeriCorps member to outside trainings that are not required by the AmeriCorps program. We see this as a valuable opportunity for professional development, and if it fits in the member's training plan we highly encourage it! We love to see our PS invest in their member's training by offering additional opportunities. The cost of outside trainings is covered by the PS, and many of our partners choose to use staff professional development funds to support these opportunities.

RECORDING AND TRACKING MEMBER TRAINING

It's important that our VIP-SE Fellows track and record all of their trainings in order to receive AmeriCorps credit for their time. In addition to recording training time in their time sheet on OnCorps, every training members participate in must be recorded in one of the following ways:

- **CALSERVES OR SUPERVISING ORGANIZATION SIGN IN SHEET.** At all trainings hosted by CALSERVES or the Supervising Organization, we supply a required sign in/out sheet so that members receive credit for their time,
- **AMERICORPS FELLOW INDIVIDUAL TRAINING LOG.** Throughout the year, The AmeriCorps member must use the log in their Member binder to record all trainings for which they don't sign in and sign in on a VIP sign-in sheet. This includes: training at the Partner Site, coaching sessions with their supervisor, VIP-SE Leader, or Supervising Organization supervisor, other live trainings outside the Supervising Organization, and online training.

As the member's supervisor, you may ask to see the member's training log at any time to verify training hours in OnCorps. After completing each page of the log, members sign the document, and submit to you, their Partner Site supervisor, to review and sign. At the end of the service year, members submit their training log to the Supervising Organization.



All labor that uplifts humanity has dignity and importance and should be undertaken with painstaking excellence.



Martin Luther King Jr.

CALSERVES PROGRAM EVALUATION

REPORTING ON RESULTS IS AN ESSENTIAL PART OF VIP-SE. Through site visits and reporting, we track your organization's progress towards program goals.

SITE VISITS

A site visit entails an appointment for VIP-SE staff or funders to meet with AmeriCorps program participants at Partner Sites (PS). CalSERVES and Supervising Organizations (SO) regularly conduct site visits at our PS. CaliforniaVolunteers also sometimes conducts visits at our PS. Site visits provide opportunity for visiting staff to:

- See the program in action and gain qualitative insight into the effects of the AmeriCorps member's work
- Learn about the PS's experience of the program
- Learn about the AmeriCorps member's experience of the program
- Collect feedback about the program
- Offer problem-solving and wisdom to address needs
- Ensure program goals and expectations are met at the PS, including compliance with applicable AmeriCorps regulations

Your organization will take part in one or more site visits during the term of service. Depending on the nature of the visit, a staff member and/or the AmeriCorps member may be asked to meet with a visitor from the AmeriCorps program (SO, CalSERVES, or CaliforniaVolunteers staff) to discuss progress, take a site tour, or discuss program experiences. Site visits are scheduled with as much advance notice as possible, but are sometimes scheduled on short notice to meet funder requirements. Site visits normally take 30 minutes to 2 hours depending on the circumstances.

Here are some tips to help you prepare for a successful VIP-SE site visit and communicate clearly about your volunteer program:

- Print copies of your work plan for the AmeriCorps member and be prepared to discuss progress made
- Print copies of your organization's latest Volunteer Capacity Assessment and VIP-SE Service Enterprise Progress Assessment and be prepared to discuss planned areas of growth
- Prepare an overview of the volunteer program (with a tour, if applicable) that can be delivered by a staff member or the AmeriCorps member
- Bring a "great story" or anecdote about the work of volunteers at the organization. If appropriate (ask the staff person who scheduled the visit), you may want to invite a volunteer to talk about their experiences or service.

- Other information or materials may be requested prior to the visit – ask the staff person who scheduled the visit for more information

REPORTING

As you know, reporting is a vital part of any well-designed service program. We need to evaluate if our efforts have us on track to meet our goals, our funders need to know that we're using their funds like we said we would, and we need proof in numbers to show our communities what great work we're doing.

We want you to focus on the work of building volunteer programs, not filling out meaningless paperwork. So don't worry, all reports you submit to us at CalSERVES are intentional and correspond directly to evaluation of at least one of our program goals. We won't be sending you any busy work.

PS are responsible for completing:

- Volunteer Capacity Assessments
- Member Evaluations
- Bi-Monthly Surveys
- Assisting VIP-SE Fellows in completing Monthly Reports
- Approving AmeriCorps Time Sheets and Monthly Reports online via OnCorps

The following table shows an overview of Partner Site evaluation documents:

	Overview of VIP Evaluation Documents for Partner Sites				
	VCA	Member Evaluation	Bi-Monthly Surveys	Monthly member reports	Member time sheets
What does it measure?	Volunteer capacity growth at the PS	The member's professional growth	The program's impact at the PS	The program's impact at the PS	The member's AmeriCorps time
Why? What's the target?	PS to achieve 8 new indicators by final assessment	Member to grow by 20% in professional skills by final assessment	Ensure efficacy of program	Recruitment of volunteers & fundraising \$2,000	Member to complete AmeriCorps hours as defined in role
When to complete?	3 times annually: baseline, mid, & final		Every other month	Monthly	Biweekly
Who completes it?	Supervisor at PS (may sometimes be completed by SO staff or supervisor)		Supervisor at PS	AmeriCorps member (with help from PS)	AmeriCorps member; approved by PS & SO staff

Volunteer Capacity Assessment (VCA)

What it's used for: This tool measures the organization's progress towards the central program goal: building an effective, sustainable volunteer infrastructure.

What it is: The Volunteer Capacity Assessment (VCA) measures the level of volunteer program infrastructure present at a service organization. This tool is designed for use by nonprofit, government, and education agencies. The VCA measures best practices of volunteer infrastructure through 47 indicators. Experts at CalSERVES identified these indicators by gleaning best practices from across the volunteer management field, and adding wisdom from CalSERVES' experience in helping build volunteer programs in over 300 nonprofit, government, and educational organizations since 2009. An additional column is listed for Service Enterprise sites relevant to your SE Action Plan.

Our target: Your organization will achieve 8 new indicators of volunteer capacity each year. In practice, this means that your agency will have in place 8 new structures or systems that support the volunteer program. On the VCA, this means that at least 8 indicators rated as "No" or "Somewhat" on the baseline assessment will be rated as "Yes" by the final assessment.

When it's completed: The VCA is completed 3 times per year: we collect baseline, mid-year, and final assessments. The baseline is collected in the fall. Mid-year and final assessments are generally collected in February and July, respectively. Ask your SO for a schedule of this year's collection dates.

Who completes it: PS staff or SO staff may complete the VCA. The individual who completes the form should have a familiarity with the PS's volunteer program. The same individual should complete baseline, mid-year, and final assessments.

How to complete it: Detailed instructions are included on page 1 of the VCA form. The VCA is essentially a checklist of volunteer structures ("indicators") your agency has not put in place yet OR has already put in place. If an indicator is in place and has been completed, mark "Yes" in the Achieved column of the assessment; if an indicator has not been achieved, mark "No;" if an indicator in process of being completed but is not yet complete, mark "Somewhat."

How it helps you: Your site's current VCA gives a guidepost for communication with AmeriCorps members about the state of volunteer systems at your organization. This should guide the work of your VIP Fellow.

VCA Helpful Tips:

- The VCA measures mostly static structures of a volunteer program, and thus can provide a record of progress over time. Once you mark "yes" for an indicator (meaning that it's been achieved), it will be considered "yes" on all future assessments because you've reported that you have the structure in place.
- The VCA defines much of the scope of VIP-SE's work in infrastructure development. Sites who achieve all standards on the VCA show they have

- achieved a sustainable volunteer program – a reason to celebrate! These programs are on their way toward “graduating” from VIP-SE successfully.
- The VCA is not a reflection of the quality of work of the VIP-SE Fellow; rather, it’s an assessment of the state of your organization’s volunteer program.

AmeriCorps Member Evaluations (Member Eval)

What it's used for: This tool measures the AmeriCorps member's professional skill development.

What it is: The Member Eval is a 3-page document that contains 38 performance characteristics divided into 7 sections (categories). The Eval measures the member's performance in each characteristic on a numeric scale of 1 (lowest score) to 5 (highest score). An average overall score is calculated at the end of the evaluation.

Our target: Each AmeriCorps member will exhibit an improvement in performance and skill by achieving 20% growth in the average overall score on the Member Eval.

When it's completed: The Member Eval is completed 3 times per year; we collect baseline, mid-year, and final assessments. The baseline is collected within the first month of the AmeriCorps member's service. Mid-year and final assessments are generally collected in February and July, respectively. Ask your SO for a schedule of this year's collection dates.

Who completes it: The AmeriCorps member's supervisor at the PS or SO may complete the Member Eval. The individual who completes the form should have a familiarity with the AmeriCorps member's work. The same individual should complete baseline, mid-year, and final assessments.

How to complete it: The Member Eval gives you the chance to assess the AmeriCorps member's work through 38 performance characteristics. You will rate each characteristic on a scale of 1 (lowest score possible) to 5 (highest score possible). Each rating is defined as:

- 1: Coaching Required
- 2: Learning Expectations
- 3: Meets Expectations
- 4: Exceeds Expectations
- 5: Exceptional

In addition to numerical ratings, there is space to enter additional comments under each of the 7 sections. Use this space to write in additional information about your ratings that the member or CalSERVES may find helpful.

Once the form is completed, discuss your ratings with the AmeriCorps member. After discussing, both the supervisor and member sign the form. The member will mark whether or not they agree with the assessment, and may also add comments in the designated area.

Member Evaluation Helpful Tips:

- The Member Eval should always be discussed with the AmeriCorps member before submitting to CalSERVES. Use the opportunity to discuss with the AmeriCorps member areas for performance improvement, and be sure to affirm areas where they excel.
- If you notice performance issues, don't wait until the next Member Eval to address the issues with the member. Address issues as they arise, so that your ratings won't be a surprise to the AmeriCorps member.
- “N/A” is not an acceptable rating. All performance characteristics are relevant to the VIP Fellow role and should be rated between 1 and 5.

Bi-Monthly PS Surveys

What it's used for: This is the tool we utilize to make sure the program is running as effectively as possible, and that we're meeting ongoing targets at Partner Sites.

What it is: The Bi-Monthly Survey provides CalSERVES with information from the “ground level” of the program, directly from Partner Sites. Requested information may change month to month, but feedback will often be requested on member performance, training, and volunteer capacity progress.

Our target: For CalSERVES staff to stay up to date with program happenings at Partner Sites to ensure progress is on track towards goals.

When it's completed: These surveys are completed every other month.

Who completes it: The AmeriCorps member’s supervisor at the PS.

How to complete it: The Bi-Monthly Survey is distributed electronically each month. Check your email or the OnCorps portal for updates.

Helpful Tips:

- Bi-Monthly Survey responses are sent directly to CalSERVES staff. These surveys are an easy way for you to communicate with CalSERVES.
- CalSERVES loves to hear from our Partner Sites! We depend on your feedback about what's going well and what we can improve so that we make sure we're meeting our targets at your site. Thank you for taking the time to communicate with us through these surveys.

AmeriCorps Time Sheets via OnCorps

What it's used for: This tool measures the AmeriCorps member’s progress towards their AmeriCorps service hour commitment.

What it is: The AmeriCorps member logs their hours served every day, separated into service activity categories.

Our target: Each AmeriCorps member will complete the 1700-hour service commitment, spending their hours on activities defined in their position description.

When it's completed: The member should fill in their hours served every day, and submit their time sheet biweekly (twice per month).

Who completes it: The AmeriCorps member completes the time sheet. After submission, the time sheet is approved by Partner Site and SO staff.

How to complete it: AmeriCorps members and Partner Site supervisors are provided with instructions on completion and approval of time sheets from OnCorps. Please refer to OnCorps materials or contact OnCorps for more information.

Time Sheet Helpful Tips:

- We rely on the PS supervisor's knowledge of the member's time when verifying time sheets. Be involved in your AmeriCorps member's work and keep them accountable for their scheduled service hours.
- If an error is found on a member's time sheet, it will be returned to the member for edits. If you see a mistake on the time sheet, don't let it slide – send it back to the member for correction.

AmeriCorps Member Monthly Report

What it's used for: This tool tracks volunteer recruitment, volunteer hours served, donations received, and information about each VIP-SE Fellow's work.

What it is: The AmeriCorps Member Monthly Report is an online form filled out by the AmeriCorps member through OnCorps. Each member reports on volunteer, donation, and volunteer capacity data.

Our target: Each AmeriCorps member will recruit, place, or train short-term and long-term volunteers; garner \$2,000 of cash or in-kind donations to support the volunteer program at the Partner Site; and work towards volunteer infrastructure goals set by the program.

When it's completed: You guessed it! The member fills this out monthly, within the first two weeks of the month for the previous month.

Who completes it: The AmeriCorps member completes this report, but may need assistance from PS staff to provide or verify donations, volunteer numbers and hours, and records to support this information.

How to complete it: AmeriCorps members are provided detailed instructions in the AmeriCorps Member Handbook. The member will provide the following information according to the report instructions:

- Volunteer numbers and hours*
- Donation records*
- Great stories and pictures
- Volunteer capacity progress and other volunteer program-related information

*The organization must keep records of volunteer and donation data to comply with Corporation for National and Community Service standards. The AmeriCorps member is responsible for gathering this information for their reports, but Partner Site staff may need to provide assistance in order to make the information available to the member. See the next section for additional information.

PARTNER SITE VOLUNTEER & DONATION REPORTING STANDARDS

Accurate tracking of volunteer programs is important to VIP-SE and to our funders, CaliforniaVolunteers and the Corporation for National and Community Service. In order to comply with CNCS standards, make sure to keep records as outlined below.

Volunteer Numbers and Hours Records

Every VIP-SE Partner Site is required to track volunteers.

TO COMPLY WITH CORPORATION FOR NATIONAL AND COMMUNITY SERVICE REPORTING STANDARDS, THE PARTNER SITE'S VOLUNTEER RECORDS MUST INCLUDE AT A MINIMUM (FOR THE VOLUNTEERS THAT VIP FELLOWS REPORT):

- Volunteer names;
- Relevant demographic information (including location of residence);
- Method of recruitment;
- Participation in orientation and/or training activities;
- Planned and actual role(s);
- Assignment(s) or activities;
- Start and end dates of service
- Each volunteer's dates of service; and
- How many hours each volunteer served on each day of service.

Most Partner Sites already have an established tracking system (though one of your capacity building goals may be to improve or update it). A few Partner Sites don't currently have any system for tracking volunteers. If your agency does not track volunteers or does not currently track the information required by CNCS, putting tracking methods into place should be one of the AmeriCorps member's first projects – the agency will need to track this information for the member's monthly reports.

There are a wide variety of volunteer tracking systems available. What appropriate volunteer tracking looks like will vary from Partner Site to Partner Site, depending on the organization's needs and circumstances. If you have questions about volunteer tracking methods you use or want to make sure you're tracking all of the information needed for your VIP-SE reporting, talk to your Supervising Organization.

AmeriCorps members must report the number of volunteers they've recruited, trained, or worked with, as well as the number of hours they have served. They will not report all volunteers serving at the agency – only those that the member has directly recruited or managed. For our program's purposes, the Partner Site's volunteer records are considered "**BACKUP**" information for AmeriCorps member monthly reports. Backup is a copy of the 'raw data' you calculated your volunteer numbers from, and can be any of the following:

- Copies of physical sign-in logs

- Reports from a volunteer tracking database, or
- A copy of an Excel spreadsheet that captures information collected from volunteers.

Your Supervising Organization supervisor or CalSERVES staff may request copies or a visual check of Backup at any time to verify the numbers that AmeriCorps members submit in their monthly report.

Donation Records

Partner Sites are required to track donations. Similar to volunteer tracking, there are a wide variety of donation tracking options, and the systems used will vary between Partner Sites.

VIP-SE Fellows seek cash donations and in-kind donations from organizations, businesses, and individuals to support the Partner Site's volunteer program, at the direction of the Partner Site supervisor. In-kind donations include non-cash contributions that come in many forms: from physical items (like a can of paint) to services (like a landscaper donating labor services to build a community garden) to physical space (like a venue donating a space rental for an event).

THE PARTNER SITE'S DONATION RECORDS MUST INCLUDE AT A MINIMUM (FOR THE DONATIONS THAT VIP FELLOWS WILL REPORT):

- Donor name (individual or business);
- What was donated (item, service, or cash);
- Dollar value of the donation, if it was in-kind;
- What the donation was used for (or what budget line/program it supported); and
- A copy of the donation receipt, if one was issued.

AmeriCorps VIP-SE members report the dollar amount of in-kind and cash donations they've earned for your agency. Donation records are considered “**BACKUP**” information for donation numbers recorded in your monthly reports. In addition to your agency's records as Backup, members may find it helpful to utilize the VIP-SE Donation Log found in their member binder. Your Supervising Organization or CalSERVES staff may request copies or a visual check of Backup at any time to verify the numbers submitted by AmeriCorps members in their monthly report.

Ask your Supervising Organization for a calendar of this year's evaluation due dates.

APPENDIX

RESOURCES YOU'LL FIND USEFUL.

APPENDIX A: IMPORTANT FORMS

VOLUNTEER CAPACITY ASSESSMENT



Volunteer Capacity Assessment

PURPOSE

The Volunteer Capacity Assessment (VCA) measures the level of volunteer program infrastructure present at a service organization. This tool is designed for use by nonprofit, government, and education agencies. The VCA measures best practices of volunteer infrastructure through 47 indicators. The best practices of volunteer management measured by this assessment fall in these categories:

- | | |
|---------------------------------------|--|
| 1. Organizational structure | 8. Training |
| 2. Allocated resources for volunteers | 9. Supervision |
| 3. Outside partnerships | 10. Relationships between volunteers & staff |
| 4. Recruitment & outreach strategy | 11. Recognition and retention strategies |
| 5. Program policies | 12. Volunteer feedback structures |
| 6. Fully developed volunteer roles | 13. Tracking and recording systems |
| 7. Screening procedures | |

INSTRUCTIONS

WHO COMPLETES THE VCA: The VCA should be completed by the individual or team responsible for leading the volunteer program. Collaboration among staff or volunteer teams is encouraged.

VCA STRUCTURE: The VCA consists of 47 indicators of volunteer capacity. Respondents mark whether or not these indicators are in place at the agency. The indicators are broken into three linear "levels" of program development. Level 1 represents indicators indicative of early program development. Levels 2 and 3 include indicators that generally represent progressively more advanced program capacity.

HOW TO FILL OUT THE VCA: Mark "Yes," "Somewhat," or "No" for each indicator listed. Please mark only one answer per question in the column that corresponds with the assessment period.

- Mark "Yes" for indicators that have been completed/are in place at the organization.
- Mark "Somewhat" for indicators that are in the process of being completed or put in place at the organization.
- Mark "No" for indicators that are not in place at the organization.

WHEN TO COMPLETE THE VCA: CalSERVES recommends that agencies complete the VCA 3 times per year to measure progress made over time. There are designated spaces on the form for "pre," "mid," and "post" assessments. For each assessment period, use the indicated columns.

HOW TO USE THE COMPLETED VCA: Note the indicators marked "No" or "Somewhat." Determine which of these indicators would be most helpful in strengthening your volunteer program, and begin working towards a "Yes."

Assessment Period:	Agency Name: <input type="text"/>
<input type="checkbox"/> Baseline/Pre	Assessment Completed By: <input type="text"/>
<input type="checkbox"/> Mid	Date: <input type="text"/> --MONTH-- <input type="text"/> --DAY-- <input type="text"/> --YEAR--
<input type="checkbox"/> Post	

Reset Page **Save**

LEVEL 1

Volunteer Plan Development

Level 1 indicators reflect basic volunteer utilization, address values for volunteer involvement and address the need for procedures for managing volunteers.

Indicator	Achieved (Yes/Somewhat//No)		
	Baseline	Mid	Final
1a Benefits and challenges related to volunteer involvement inside the organization have been identified.	----	----	----
1b Organizational leadership has defined volunteer engagement as a priority.	----	----	----
1c There is a plan in place to dedicate appropriate resources (e.g., financial, space, training, supervision, etc.) to the organization's volunteer program.	----	----	----
1d A recruitment plan for volunteers has been created, including marketing to community organizations (e.g., outside organizations, businesses, service clubs) and diverse populations.	----	----	----
1e Potential community partnerships for recruitment have been identified (e.g., outside organizations, businesses, service clubs).	----	----	----
1f Human resources and risk management policies that relate specifically to volunteers have been developed.	----	----	----
1g A volunteer waiver form that addresses potential risks is signed by all volunteers.	----	----	----
1h Needs for volunteer roles throughout the organization have been identified, including opportunities for skilled volunteers or volunteer leaders.	----	----	----
1i Volunteer position descriptions that include performance goals or expectations have been developed.	----	----	----
1j A volunteer application form and application process is in place (e.g., system for distributing, collecting, and reviewing applications and conducting interviews as appropriate).	----	----	----
1k An interviewing and screening process, including appropriate criminal and/or motor vehicle background checks when applicable, has been developed and implemented.	----	----	----
1l Volunteer orientation trainings and materials have been created and implemented (e.g., handbook, emergency procedures plan, etc.)	----	----	----
1m A supervisor has been identified for every volunteer role.	----	----	----
1n A volunteer retention and recognition plan that includes formal (e.g., celebration, gifts) and informal (e.g., organizational culture of appreciation) recognition has been developed.	----	----	----
1o A system to receive volunteer feedback has been developed.	----	----	----
1p Volunteer tracking mechanisms (e.g., tracking of volunteer hours, tasks accomplished, etc.) are in place.	----	----	----

Reset Page



Save

LEVEL 2

Volunteer Plan Implementation

Organizations that have achieved indicators on Level 2 reflect comfort and confidence from staff in supervising and utilizing volunteers effectively. Level 2 organizations have begun to put into practice the plans made in Level 1.

Indicator	Achieved (Yes/Somewhat//No)		
	Baseline	Mid	Final
2a A purpose statement has been developed for the organization's volunteer program.	----	----	----
2b Resources (financial, space, training, supervision, etc.) have been allocated for a volunteer management program.	----	----	----
2c A plan has been created to incorporate community organizations (e.g., outside organizations, businesses, service clubs) in regular volunteer activities.	----	----	----
2d Strategies to develop potential partnerships with community organizations (e.g., outside organizations, businesses, service clubs) have been identified.	----	----	----
2e A volunteer recruitment plan has been implemented.	----	----	----
2f All volunteers and staff have been trained in appropriate human resources and risk management policies that relate specifically to volunteers.	----	----	----
2g Diverse volunteer roles that include a wide range of abilities, ages, and interests have been established.	----	----	----
2h Volunteer roles have been documented and communicated to appropriate staff.	----	----	----
2i A system to provide feedback and evaluation on the work of individual volunteers has been developed.	----	----	----
2j A responsive communications process is in place so volunteers are contacted within a reasonable time after they apply.	----	----	----
2k An ongoing volunteer training plan and materials have been developed.	----	----	----
2l Volunteer supervision responsibilities are included in staff and higher-level volunteer position descriptions (e.g., providing support, opportunities for communication, accountability).	----	----	----
2m Strategies (e.g., events) are in place to build relationships between staff and volunteers.	----	----	----
2n A system is implemented for volunteers to receive formal (e.g., celebration, gifts) and informal (e.g., organizational culture of appreciation) recognition of their contributions.	----	----	----
2o A system to receive volunteer feedback has been implemented.	----	----	----
2p Volunteer tracking mechanisms are maintained and checked for accuracy on a regular basis.	----	----	----

[Reset Page](#)

LEVEL 3

Volunteer Plan Sustainability

Organizations that have achieved indicators on Level 3 utilize volunteers alongside staff to achieve the mission. Though ongoing program operation is always needed, Level 3 organizations have the infrastructure to sustain the volunteer program.

Indicator	Achieved (Yes/Somewhat//No)		
	Baseline	Mid	Final
3a A plan for integrating volunteers into the organizational structure at multiple levels has been developed.	----	----	----
3b The organization's annual budget reflects detailed expenses for volunteers (e.g., staff time, recruitment, training, supplies, space, recognition, etc.)	----	----	----
3c At least two community organizations (e.g., outside organizations, businesses, service clubs) have been approached in efforts to build partnerships for volunteer roles in the organization.	----	----	----
3d Recruitment efforts are regularly evaluated for their effectiveness and adjustments are made to strategies accordingly.	----	----	----
3e The organization has a plan to ensure that volunteers represent the diversity within the community, including a system for recruiting and meeting needs of diverse groups.	----	----	----
3f Volunteer supervisors are held accountable for ensuring that their volunteers are complying with applicable human resources and risk management policies.	----	----	----
3g The organization conducts an annual review and update of all volunteer position descriptions.	----	----	----
3h A system to provide feedback and evaluation on the work of individual volunteers has been implemented.	----	----	----
3i Volunteers are matched with appropriate positions based on their abilities, interests, and level of commitment.	----	----	----
3j Ongoing training plan and materials have been implemented.	----	----	----
3k Staff and volunteer leaders are trained in volunteer management best practices that include varied approaches appropriate for diverse individuals and groups.	----	----	----
3l Conflicts between staff and volunteers have been anticipated and addressed by organization administration.	----	----	----
3m The organization's volunteer retention rate (e.g., number of volunteers that completed their original commitment to the organization) is tracked, recorded, and analyzed.	----	----	----
3n There is a process in place to analyze volunteer feedback and to make adjustments to the program.	----	----	----
3o An evaluation plan has been developed to utilize the data obtained using the volunteer tracking mechanisms.	----	----	----

Reset Page

Save



CalSERVES AmeriCorps Fellow Performance Evaluation

AmeriCorps Performance Evaluation

One of the CalSERVES AmeriCorps programs' top priorities is member development. It is our goal that each AmeriCorps member grows by 20% in their performance over the year - as measured by this assessment.

The purpose of this evaluation is to track the member's personal and professional growth in the categories listed on the following pages. We compare baseline evaluations with mid-year and final evaluations to demonstrate growth.

Please keep this in mind as you complete this form.

Please review the members' position description and pay attention to the rating descriptions below. Baselines should reflect where the member begins their service - at which point they are unfamiliar with the position and have ample room to grow. Mid-year and Final Reviews should show growth compared to the baseline.

INSTRUCTIONS

- Three evaluations per service year are required - Baseline, Mid-Term & Final. Refer to this year's deadline calendar for due dates.
- Provide candid, honest responses. Honest feedback allows AmeriCorps members to make the improvements that will enhance their performance with your organization and as they move to school or career.
- Carefully evaluate each of the performance characteristics separately, based on recurring day-to-day performance and not based on isolated events.
- Supervisors are encouraged to make comments. These reviews are intended as a mutual exchange of information, enabling members to progress towards their optimal performance potential.
- Use the following rating scale for each performance characteristic:

Performance Rating Indicators	
5 - Exceptional	Performance is excellent and consistently recognized as being above and beyond requirements/expectations; performance potential deemed optimal. Member is a role model to others in this area.
4 - Exceeds Expectations	Performance often exceeds expectations; member exhibits above-average performance in this area.
3 - Meets Expectations	Performance consistently meets expectations and requirements.
2 - Learning Expectations	Performance frequently meets minimum requirements; performance needs improvement to meet expectations.
1 - Coaching Required	Member is at the beginning of their performance potential and understanding of this characteristic. Improvement is needed to meet position requirements.



AmeriCorps Fellow Performance Evaluation

Period

Fellow Name

Partner Site

Supervisor Name

Evaluation Date

Enter the appropriate performance rating indicator in each row (see instruction sheet for definitions).
Written comments are mandatory to explain a rating “5 - Exceptional” or “1-Coaching Required.”

Section 1: Position Knowledge

Rating	Performance Characteristic
1 (Coaching Req)	Displays thorough knowledge and understanding of assigned duties.
1 (Coaching Req)	Demonstrates “know how” and skills necessary to perform service competently; knowledge appropriate for position.
1 (Coaching Req)	Understands interrelationship of the position to the rest of the organization (i.e., priorities and philosophies).
1 (Coaching Req)	Utilizes knowledge of the AmeriCorps program, and Corporation for National and Community Service programs on a routine basis.
1.00	Position Knowledge average

Comments

Section 2: Completion of Objectives

Rating	Performance Characteristic
1 (Coaching Req)	Has adequately completed or striving towards completion of objectives set forth by the host organization.
1 (Coaching Req)	Made outreach presentations to other organizations and businesses promoting volunteerism at the partner site and the AmeriCorps program.
1 (Coaching Req)	Has established connections with the business community.
1.00	Completion of Objectives average

Comments

Section 3: Quality of Service

Rating	Performance Characteristic
1 (Coaching Req)	Appropriate attention to detail.
1 (Coaching Req)	Meets targets and deadlines.
1 (Coaching Req)	Utilizes supervision appropriately; able to serve with limited supervision; demonstrates initiative.
1 (Coaching Req)	Flexible and adaptable; demonstrates ability to perform under stress.

Rating	Performance Characteristic
1 (Coaching Required)	Results are accurate, reliable, and consistent with training.
1 (Coaching Required)	Plans and organizes service for maximum effectiveness and efficiency.
1.00	Quality of Service average

Comments

Section 4: Attitude

Rating	Performance Characteristic
1 (Coaching Required)	Willingly accepts and responds to direction, constructive criticism, and delegated assignments; accepts suggestions.
1 (Coaching Required)	Serves well with other team members.
1 (Coaching Required)	Accepts full responsibility for actions.
1 (Coaching Required)	Presents a neat, clean appearance appropriate to site/other staff's appearance.
1 (Coaching Required)	Willingly observes and supports the organization's policies and procedures.
1.00	Attitude average

Comments

Section 5: Communication

Rating	Performance Characteristic
1 (Coaching Required)	Expresses self clearly and concisely in written and oral communications.
1 (Coaching Required)	Utilizes appropriate conflict management practice (i.e., speaks for self, does not engage in gossip or dissemination of rumors, clearly identifies interests, seeks win/win solutions).
1 (Coaching Required)	Communicates well with clients, peers, and supervisors.
1 (Coaching Required)	Employs active listening skills, requesting clarification and feedback when needed.
1.00	Communication average

Comments

Section 6: Relationships

Rating	Performance Characteristic
1 (Coaching Required)	Promotes favorable client and/or public relations.
1 (Coaching Required)	Earns respect of others.
1 (Coaching Required)	Develops and maintains effective working relationship with supervisors, peers, and others outside the unit.
1.00	Relationships average

Section 6, Continued

Comments:

Section 7: Planning/Organization/Time Management

Rating	Performance Characteristic
1 (Coaching Required)	Anticipates and plans ahead.
1 (Coaching Required)	Is punctual in keeping appointments.
1 (Coaching Required)	Sets a course of action to meet goals on time for self, for others, and for the program.
1 (Coaching Required)	Develops concepts and strategies necessary for the recruitment, supervision, and coordination of volunteers.
1 (Coaching Required)	Effective use of service time; does not negatively impact the service of others.
1 (Coaching Required)	Takes initiative to accomplish more than what is required.
1 (Coaching Required)	Good attendance habits.
1 (Coaching Required)	Determines courses of action that are most effective and efficient.
1 (Coaching Required)	Handles a variety of tasks concurrently.
1 (Coaching Required)	Demonstrates logical thinking that results in timely and practical decisions.
1 (Coaching Required)	Ability to commit to a definite course of action.
1 (Coaching Required)	Accepts responsibility for decisions or positions taken.
1 (Coaching Required)	Makes appropriate and timely decisions.
1.00	Planning/Organization/Time Management average

Comments

Performance Evaluation Average Rating:

1.00

To the AmeriCorps Fellow:

This evaluation has been discussed with me AND:



I agree with it



I disagree with it

**Member
comments**

(any comments
are voluntary)

Member Signature

Supervisor Signature

Date

Date

APPENDIX B: HELPFUL RESOURCES

Find more information on the AmeriCorps member role: see the AmeriCorps Member Handbook available on the CalSERVES Resource Center in Google Drive: <http://bit.ly/CalSERVESresources>

Find more information on your obligations as a Partner Site: see the Memorandum of Understanding; this is the written agreement between your organization and the Supervising Organization.

Learn more about CalSERVES and Napa County Office of Education Community Programs on the CalSERVES website: www.calserves.org.

Learn more about CaliforniaVolunteers: Learn more about the organization that administers funding for VIP on their website: <http://www.californiavolunteers.org/>

Learn more about Service Enterprise information on the Points of Light website: <http://www.pointsoflight.org/service-enterprise-initiative>

Learn more about AmeriCorps programs across the nation and the Corporation for National and Community Service: See <http://cncs.gov/>

Keep up to date on the AmeriCorps provisions that affect how we use AmeriCorps funding: See the <http://www.nationalservice.gov/build-your-capacity/grants/managing-americorps-grants#AmeriCorps%20Provisions>

Learn helpful tips on AmeriCorps supervision: Check out VISTA Campus. VISTA is another branch of AmeriCorps. Much of the information can apply to our program, but keep in mind that not all of the information applies. Click “Supervisors” on the home page and choose to “Enter Campus as Guest.”
<http://www.vistacampus.org/>

Get help managing AmeriCorps members, completing VIP Evaluation paperwork, and building your volunteer program from your Supervising Organization supervisor. They want to help you make this year a success for your organization!