

Program Director's Handbook

2002-2003



Program Director's Handbook

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Acronyms Used Throughout This Handbook

AA	Accounting Administrator	INS	Immigration and Naturalization Service
AASC	American Association of State Service Commissions	IHS	Indian Health Service
AARP	American Association of Retired Persons	IRS	Internal Revenue Service
AC	AmeriCorps	ITT	Indian Tribes and Territories
AEAP, EAO	AmeriCorps Education Award Only Programs	JAN	Job Accommodation Network
APFP	AmeriCorps Promise Fellows Programs	LULAC	League of United Latin American Citizens
AC*RPS	AmeriCorps Web-based Recruitment and Placement System	MIB	Mississippi Industries for the Blind
ADD	Accidental Death and Dismemberment	MLK	Martin Luther King, Jr.
ADR	Alternative Dispute Resolution	NAACP	National Association for the Advancement of Colored People
AFDC	Aid to Families with Dependent Children	NACCRRA	National Association of Child Care Resource and Referral Agencies
CCDF	Child Care and Development Fund	NCCC	National Civilian Community Corps
CEO	Chief Executive Officer	NCLR	National Council of La Raza
CFR	Code of Federal Regulations	NSFP	National Service Fellowship Program
CHIP	Children's Health Insurance Program	NSL	National Service Leadership Program
CNCS	Corporation for National and Community Service	NSLI	National Service Leadership Institute
COA	Cost of Attendance	NSRC	National Service Resource Center
CPR	Cardiopulmonary Resuscitation	OIG	Office of the Inspector General
CRF	Constitutional Rights Foundation	OMB	Office of Management and Budget
DBTAC	Disability and Business Technical Assistance Centers	PD	Program Director
EA	Executive Administrator	PSA	Public Service Announcement
ED	Executive Director	PSSA	President's Student Service Award
EPICENTER	Effective Practices Information Center	P/TOA	Parent/Tribal Organization Administrator
ETR	Education Training Research Associates	P/TOD	Parent/Tribal Organization Director
FICA	Federal Insurance Contributions Act	RSVP	Retired and Senior Volunteer Program
FD	Financial Director	SA	Site Administrator
FSL	Fundamentals of Service Leadership	SD	Site Director
FSR	Financial Status Report	SSDI	Social Security Disability Insurance
FTE	Full-time Equivalent	SSI	Supplemental Security Income
FMS	Financial Management System	TANF	Temporary Assistance to Needy Families
GED	General Educational Development Diploma	TDD	Telecommunications Device for the Deaf
HHS	Health and Human Services	T/TA	Training and Technical Assistance
ICC	Inter-Corps Council	TTY	Teletype
ICI	Institute for Community Inclusion	USC	United States Code
ID	Identification	VISTA	Volunteers in Service to America
ILC	Independent Living Centers	WBRS	Web-Based Reporting System
		WIC	Women, Infants, and Children
		YMCA	Young Men's Christian Association

Useful Online Resources

Recruitment

www.americorps.org/resources

Member Enrollment and Program Reporting

wbrs.net

AmeriCorps Gear and Signage

www.nationalservicecatalog.org

Training and Technical Assistance Providers

www.americorps.org/resources

National Service Calendar,

Listserves and other resources

www.etr.org

AmeriCorps Provisions and Handbooks

www.americorps.org/resources/manuals.html

AmeriCorps Legislation

www.nationalservice.org/about/ogc

AmeriCorps Alumni

www.americorpsalumni.org

Information about Education Award

www.americorpsalums.org **and**

www.americorps.org/members/edaward.html

All national service programs funded by CNCS

www.nationalservice.org

State Profiles

www.nationalservice.org/stateprofiles/

Overview

What is the purpose of this handbook?

This handbook is meant to assist you as a program manager in a general understanding of the current law, regulations, and policies relating to AmeriCorps programs. It does not constitute the Corporation for National and Community Service's official definitive interpretation of specific factual or legal questions.

Does this handbook replace the grant provisions attached to my grant agreement?

No. You should always refer to your grant provisions first and use this handbook for examples and explanations of what is stated in the provisions. Program directors or individuals with particular questions should consult the National and Community Service Act of 1990 (42 U.S.C. § 12501 et seq.), the regulations issued under the Act (45 C.F.R. § 2500.1 et seq.), the AmeriCorps grant provisions and Department of Grants guidance, and relevant state law and regulations. If there is a conflict between the contents of this handbook and the AmeriCorps provisions attached to your grant agreement, the provisions are the controlling authority.

Upon request, this material will be made available in alternative formats for people with disabilities.

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AmeriCorps

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What is the Corporation for National and Community Service?

Created in 1993, the Corporation for National and Community Service (referred to throughout this book as the Corporation) engages more than 1.5 million Americans annually in improving communities through service. The Corporation supports service at the national, state, and local levels, overseeing three main initiatives:

AmeriCorps, whose members serve with local and national organizations to meet community needs and, after their service, receive education awards to help finance college or training;

Learn and Serve America, which helps link service and education for students from kindergarten through college; and

National Senior Service Corps, through which Americans 55 and older contribute their skills and experience.

What is AmeriCorps?

AmeriCorps supports local, state, and national organizations across the nation that involve Americans in results-driven community service. AmeriCorps participants (called members) serve full- or part-time for a year, receive a living allowance and, upon completion of their service, receive an education award. The education awards are paid as vouchers by the National Service Trust, and may be redeemed, within seven years, to pay for current education costs at colleges, universities, other postsecondary institutions and approved school-to-work programs, or to pay back qualified student loans already incurred.

In 2001-2002, more than 50,000 Americans are serving as AmeriCorps members in more than 900 programs nationwide. AmeriCorps members are united by four common goals:

1. **Getting things done** through direct and demonstrable service that helps solve community problems in the areas of education, public safety, environment and other human needs.
2. **Strengthening communities** by bringing together Americans of all ages and backgrounds in the common effort to improve our communities.
3. **Encouraging responsibility** by enabling members to explore and exercise their responsibilities toward their communities, their families, and themselves.
4. **Expanding opportunity** by enhancing members' educational opportunities, job experience, and life skills.

AmeriCorps includes AmeriCorps*VISTA (Volunteers in Service to America), AmeriCorps*State and National, and AmeriCorps*National Civilian Community Corps (NCCC), with more than 900 national, state, and local nonprofits, including faith-based and community organizations, Indian tribes, and territories receiving AmeriCorps grants.

AmeriCorps*VISTA members serve low-income communities and families across the country. Members of AmeriCorps*VISTA work and live in the communities they serve, creating or expanding programs that can continue after they complete their service. AmeriCorps*VISTA members are assigned to local project sponsors and focus on building community capacity, mobilizing community resources, and increasing self-reliance.

AmeriCorps*State and National members participate in local service programs operated by not-for-profit organizations, local and state government entities, Indian tribes, territories, institutions of higher education, local school and police districts, and partnerships among any of the above. Program recruitment, selection and placement of members is the responsibility of the grantees. Members serving in these programs help meet communities' critical education, public safety, environmental, and other human needs.

AmeriCorps Promise Fellows serve in a leadership corps of approximately 500 full-time AmeriCorps members who spearhead community efforts to deliver the Five Promises of the Presidents' Summit for America's Future to children and youth across the nation. The program is administered at the Corporation through AmeriCorps*State and National, which competitively funds AmeriCorps Promise Fellows through grants to state service commissions, national nonprofit organizations and Indian tribes, and U.S. territories. The Fellows are recruited, selected and placed in community organizations by the grantees.

The AmeriCorps Education Awards Program provides education awards to national, state and local community service programs that can support most or all of the costs associated with managing the service of AmeriCorps members from sources other than the Corporation. Program requirements have been modified under this initiative to allow greater management and operational flexibility, but the service carried out by the members must meet the same expectation of quality and impact as other State and National programs. This program is especially suited to organizations that already conduct community service that could be further enhanced by the availability of education awards. This program does not require grantees to pay living allowances to members.

AmeriCorps*NCCC is a 10-month, full-time residential program operated directly by the Corporation. AmeriCorps*NCCC combines the best practices of civilian service with the best practices of military service, including leadership development and team-building. Members live and train at campuses located in Charleston, SC; Denver, CO; Perry Point, MD; Sacramento, CA; and Washington, DC. AmeriCorps*NCCC conducts service projects in partnership with local and state sponsors. A service-learning approach is integrated throughout all service projects, including planned activities and training.

What benefits do AmeriCorps members receive?

AmeriCorps members receive a living allowance, health care coverage, accidental insurance, child care benefits, and an education award. The benefits are explained below.

Benefits (THE LIVING ALLOWANCE—AMERICORPS PROVISION 11, AEAP 11, APFP 11)

Living allowance

The National and Community Service Act of 1990, as amended, requires an AmeriCorps program to provide its full-time members with a living allowance “in an amount equal to or greater than the

average annual subsistence allowance provided to VISTA volunteers” (§42 U.S.C. § 12594(a)(1)).

Generally, all full-time members must receive a living allowance between \$9,300 and \$18,600. The Corporation will fund only 85 percent of the minimum living allowance amount, or \$7,905 per full-time member. Programs that want to provide a living allowance in excess of \$9,300 must provide all funds over \$7,905 from non-federal sources. For example, a program desiring to provide a \$10,000 living allowance to its members would have to provide a \$1,350 match if it requested the maximum Corporation match of \$7,905. Note that this \$1,350 match must come from non-federal sources. Programs in existence prior to September 21, 1993 may offer a lower living allowance than the minimum, but Corporation funds will support only 85 percent of the actual amount.

Programs may choose to pay a living allowance to part-time members. The Corporation will fund 85 percent of the requested amount up to the pro-rated amount required for full-time members.

Education Awards programs are encouraged, but not required, to provide a living allowance to members.

AmeriCorps Promise Fellows must receive a living allowance between \$13,000 and \$18,600 based on a 12-month term of service. If the term of service is less than 12 months, the living allowance must be pro-rated. AmeriCorps Promise Fellows grantees are not subject to the match requirements for living allowances described in the paragraphs above.

The impact of member benefits

An AmeriCorps State/National member’s living allowance may not affect eligibility for federal need-based assistance provided under the Social Security Act. Thus, eligibility may not be affected in the following programs: Food Stamps; Women, Infants, and Children (WIC); HUD-subsidized housing; Veterans’ benefits.

However, eligibility might be affected for the following programs: Temporary Assistance to Needy Families (TANF); Supplemental Security Income (SSI); Social Security Disability Insurance (SSDI); State Children’s Health Insurance Program (CHIP); Title 20 Social Services programs; unemployment insurance; need-based Federal Student Financial Aid; state or local government programs. The effect, if any, under each of these assistance programs depends on the rules of the specific program.

For additional information, go to the fact sheets prepared by the Corporation’s Office of General Counsel at www.nationalservice.org/about/ogc/guidance.html.

Waiving the living allowance. AmeriCorps members who fear losing federal assistance because of the living allowance may waive the living allowance, with the following caveats:

- ★ The member must understand that every state has different regulations applying HHS rules, and that even if the member waives his or her right to receive the living allowance, the state may still consider the amount of the living allowance that the member is eligible to receive.
- ★ The member may revoke the waiver at any time during the course of the program.

- ★ If the member revokes the waiver, he or she may begin receiving the living allowance only from the date on which the waiver was revoked, he or she may not receive any portion of the living allowance that has accrued during the waiver period.

A living allowance waiver form is included in the appendix of this handbook on page 139.

Health care (RELATED AMERICORPS PROVISION 11.E, APF 11.E)

Health care coverage

If your program already carries minimum benefits as defined in provision 11.E and at a reasonable cost, they may use existing policies to cover members. If programs wish to use their existing policies, they must send a copy of the policy and a summary of its coverage and cost to the contact agency listed on page 24. Members who are also enrolled tribal members may use Indian Health Service (IHS) for their health coverage. Remember, the Corporation will not cover health care costs for family members.

If you do not have a current policy that carries the minimum health care benefits, you may use any health insurance policy for AmeriCorps members that meets the Corporation's requirements. The Corporation will pay up to 85 percent of the cost if your policy meets our minimum health care benefits and is not excessive in cost. All health care premium costs must be approved in the grant and included in the budget.

AmeriCorps Education Awards Only (EAO) programs are not required to provide health benefits to members.

Health care insurance for members on Medicaid

You must provide health care coverage to all full-time AmeriCorps and Promise Fellows members even if they are eligible for Medicaid. The U.S. Department of Health and Human Services (HHS) has taken the position that members receiving Medicaid have coverage available to them through AmeriCorps. Because Medicaid "wraps around" other available health care coverage, Medicaid will pick up only those costs that are not covered under the AmeriCorps policy. Members who remain on TANF will continue to receive Medicaid for their dependents. Members who lose TANF due to the living allowance usually can continue to receive extended Medicaid coverage for their dependents for up to one year.

Program applicants should consult with their caseworkers before enrolling in AmeriCorps.

Other insurance requirements (RELATED AMERICORPS PROVISION 11.DI, APF 11.D)

Accidental Death and Dismemberment Insurance

Under the AmeriCorps Provisions, you are responsible for ascertaining whether state law requires the provision of Workers' Compensation for members. In states where Workers' Compensation is not required, you must obtain Accidental Death and Dismemberment (ADD) insurance to cover

any member who is injured or killed in a service-related accident.

We do not endorse a particular provider of ADD insurance.

You should obtain a policy that meets the specific needs of your program and your organization. To learn more about ADD insurance in general, you may contact the Nonprofit Risk Management Center (202-785-3891), which provides Corporation funded technical assistance to grantees on insurance issues. Ultimately, each of you must make your own decision about which ADD policy suits your program and organization.

Liability insurance

Under the AmeriCorps provisions, you must have adequate liability coverage for your organization. Again, the Corporation does not endorse any particular policy or insurance provider. You should select a policy that is most suitable for your program and organization.

If you have any questions about this, contact your contact agency listed on page 24.

Child care (RELATED AMERICORPS PROVISION 11.F, APF PROVISION 11.F)

Child care benefits available to members

Eligible full-time members may receive subsidized child care through AmeriCorps*CARE while they are participating in national service. AmeriCorps*CARE child care benefits are administered through the offices of the National Association of Child Care Resource and Referral Agencies (NACCRRA). Program directors, AmeriCorps members, and child care providers may contact AmeriCorps*CARE at (800) 570-4543, through NACCRRA's website at www.naccrra.org, or by mail at AmeriCorps*CARE c/o NACCRRA 1319 F Street, NW, Suite 500, Washington, DC 20004.

In order to be eligible for the benefits, the member's family must be income-eligible and the child care provider must be legally qualified in the state. AmeriCorps*CARE will reimburse qualified child care providers up to 100% of the current local market rate for child care services. Reimbursement rates and income eligibility are based on locally established guidelines under the Child Care and Development Fund (CCDF), a federally funded program administered by each state.

Parents are responsible for registration, late, and all other miscellaneous fees incurred by the child's acceptance, enrollment, or participation in the child care program.

AmeriCorps Promise Fellows are not eligible to receive child care subsidies through AmeriCorps*CARE, but Fellows may be eligible for child care subsidies available through state administered child care assistance programs. See "Part-time Members and Child Care benefits" for suggested resources.

AmeriCorps Education Award and Promise Fellows Programs are not required to provide child care.

Qualified child care providers

To qualify for reimbursement through AmeriCorps*CARE, a child care provider must be legally qualified under the state's CCDF guidelines. Each state has its own qualification criteria. Reimbursements will not be made to ineligible providers.

You may contact AmeriCorps CARE for technical assistance in determining member eligibility, provider qualification, and for information about child care rates by calling (800) 570-4543 from 8:30 a.m. to 5:00 p.m. EST.

Eligibility for child care benefits

Full-time AmeriCorps members are eligible for child care benefits if they:

- ★ are parents or legal guardians of dependents under 13 years of age, who reside with them;
- ★ need child care paid for, in order to participate;
- ★ are not receiving child care from another available source at time of acceptance into the program; and
- ★ have a family income that does not exceed the income level established by the state's CCDF guidelines.

Members are not eligible to receive child care benefits through AmeriCorps CARE while receiving other child care subsidies.

Part-time members and child care benefits

Although no portion of child care expenses for part-time members may be paid from Corporation funds, programs may choose to provide child care to part-time members from other sources. With Corporation approval, part-time members serving full-time hours for a sustained period of time (such as a full-time summer project) may receive child care benefits through AmeriCorps*CARE, but this extension of child care benefits must be approved in the grant or via prior written approval from the Corporation's Office of Grant Management.

Part-time members (referred to as half-time members in year 2003) may be eligible for child care subsidies available through state-administered child care assistance programs. Various state child care programs are also available to families who are on TANF, "at risk" of going on TANF, or losing TANF due to the AmeriCorps living allowance. AmeriCorps member eligibility does not guarantee availability of child care assistance in any particular state. Local agencies such as the child care resource and referral agency in your area can help part-time members research information about these programs. You may also contact the state's child care coordinator (usually housed in the state Department of Education, Social Services, Human Services, Social Insurance, or similar agency) for guidance.

Education awards

At the end of their service term and after completing all the requirements of the program, members will receive an education award according to their minimum service hours. See the section entitled **What are the requirements for earning an education award?** on page 116.

Post-service job referrals

Programs are not required to provide job referrals for AmeriCorps members as they near the end of their service. However, many programs feel a responsibility to work with their AmeriCorps members throughout the year and especially toward the end of the term of service on advancing members' career and educational goals. Activities can range from offering assistance with resume writing and preparation of college applications, to working with local employers to arrange job interviews or job placements.

What are AmeriCorps common themes?

AmeriCorps programs stand for certain common themes that should be reflected upon during service. Some of these include citizenship, diversity, support for community organizations, and homeland security.

Citizenship

The National and Community Service Act of 1990, as amended, has as one of its basic purposes to “renew the ethic of civic responsibility and the spirit of community throughout the United States.”

You should provide training and use the service experience to help members acquire the knowledge, skills, and values needed to be active citizens of communities—local, state, national, and international. This means understanding how communities work and playing active roles in their undertakings.

We want members to understand the relationships between the kinds of service activities they are doing and other ways of helping communities. This may include promoting programs that take advantage of business methods to enhance civic purposes. We want members to acquire some knowledge and experience in the skills necessary to participate in a range of such activities. Where feasible and appropriate, projects should allow members to practice some of these skills during their term of service.

Programs have the flexibility to determine the materials you will use to conduct citizenship training. However, the Corporation for National and Community Service recommends two sets of curricula available to all programs:

- ★ *By the People* was developed by the Center for Democracy and Citizenship at the Humphrey Institute of Public Affairs at the University of Minnesota. *By the People* was designed to introduce AmeriCorps members and staff to a set of civic concepts that give a broader context to service and also a set of civic skills to help members serve more effectively.
- ★ *A Guide to Effective Citizenship through National Service* was developed by the Constitutional Rights Foundation. By linking citizenship to the mission of AmeriCorps, the *Guide* helps members develop the connections between their sense of themselves and their value to the community. The *Guide* provides tools for integrating active citizenship into the AmeriCorps experience through interactive sessions.

These curricula provide a series of materials and practices that focus on the knowledge, skills, and attitudes essential for active citizenship. Members are also given the opportunity to take action through service projects in the community. These curricula build upon the best practices of service programs across the country. Some examples follow.

Knowledge

To function effectively as a citizen, programs are providing AmeriCorps members with basic knowledge about citizen rights, community issues, and their community's institutions.

Many AmeriCorps programs require members to read newspapers. They supply a great deal of information about community issues. Some programs engage members in critiques of whether local newspapers cover important problems in the community and whether the coverage is fair and accurate.

Some AmeriCorps programs have their members identify and discuss the basic constitutional rights of Americans. Members debate the relative importance of these rights. Then members use this knowledge to help students and others with whom they work understand their basic rights as citizens.

Members working in the field of education are taught through interactive methods how public education is financed in a community and the political processes for making those decisions.

The current curricula can be electronically accessed at CRF's website:

www.crf-usa.org/cetta.

If, for any reason, this site cannot be accessed, printed copies can be obtained at ETR, telephone: (877) 243-ABLE.

Special technical assistance regarding civic engagement can be requested from:

The Constitutional Rights Foundation

601 N. Kingsley Dr.

Los Angeles, CA. 90005

Contact person: Tina Esposito

Tel: (877) 900-1180

E-mail: *Tina@CRF-usa.org*.

Diversity

Your program builds strong communities when it engages diverse members and staff in common service. You should actively seek to include members and staff from the communities where your project operates, as well as men and women of various races, ethnicities, education levels, socioeconomic backgrounds, and physical and mental abilities. In assessing whether your program meets this criterion, we will take into account that your program objectives might require you to recruit members and staff who share a specific characteristic or background. Please note, however, that your program cannot violate the non-discrimination, non-duplication, and non-displacement rules that govern member and staff selection.

If your program lacks diversity in one or more areas, it must strive in other ways to be diverse. You should intentionally create activities or provide opportunities for citizens to come together who might not otherwise serve or come into contact with each other. As you strive to achieve diversity, we encourage you to bring together younger and older members.

Support for community organizations (secular and faith-based)

Across the country, secular and faith-based community organizations are on the front lines, working to improve lives in some of the hardest pressed communities in America. The programs and activities supported through the Corporation for National and Community Service give vital help to these efforts. But we can do more.

In 2001, the President signed two Executive Orders emphasizing the role of community organizations, including faith-based entities, in assisting those whom prosperity has left behind.

The Corporation supports this agenda through all of its programs. In 1993, the national service legislation included community-based organizations as a category for support and defined them as private nonprofit organizations that represent a community or a significant segment of a community and that are engaged in meeting human, educational, environmental, and public safety community needs. The legislation specifically included churches and other faith-based organizations in this definition, recognizing the importance of such groups in dealing directly with the most difficult problems facing individuals in our communities.

Since 1993, we have had extensive experience working with a wide array of community-based organizations. We have worked with community-based organizations such as neighborhood associations, local social service agencies, food banks, credit unions, planning councils, after-school programs, and shelters. We have also worked directly with faith-based organizations in these same categories and have supported directly groups such as Habitat for Humanity, Lutheran Services in America, the Catholic Network for Volunteer Service, and the National Jewish Coalition for Literacy. All of these organizations play a critical role in developing and preserving communities of character in which there is support for those in need, while preserving the dignity of the individual and fostering personal responsibility.

In recognition of the critical role of these organizations, the Corporation conducted a meeting of faith-based and small community organizations to identify steps the Corporation could take to make our resources more accessible to such organizations. We learned that small community organizations (both secular and faith-based) need (1) more information about the resources and support available from federal, state, and local agencies; and (2) training and technical assistance to build the capacity to use these resources in meeting community needs. Based upon this meeting and input from other interested parties, the Corporation selected the National Crime Prevention Council's FACES Project (Faith and Communities Engaging in Service) through a national competition as a T/TA provider specifically to provide: 1) information to faith-based (FBOs) and small community based organizations (CBOs) concerning national service resources; 2) assistance to state service commissions with the development of statewide coalitions; and 3) technical assistance to all Corporation programs concerning outreach and partnership with FBOs and CBOs.

Homeland security

The tragic events of September 11, 2001 have resulted in an enormous expression of compassion by the national service network to the victims, their families, and their communities. National and community service programs are actively engaged in support efforts (please visit www.nationalservice.org for details). The Corporation for National and Community Service will support homeland security this year in three major areas: public safety; public health; and disaster mitigation, preparedness and response. Please keep in mind the following guidance that will provide some clarity and flexibility in responding to the immediate tragedy as well as the longer term rebuilding that will be required in the areas directly affected.

- ★ Programs can participate in disaster relief on a short-term or long-term basis. Hours served by members responding may count toward their AmeriCorps term of service. If programs wish to engage in disaster relief on a long-term basis, and thus, significantly change the focus of the program, please contact your Corporation Program Officer.
- ★ Time spent by AmeriCorps members donating blood is a permitted activity and may count towards their term of service.
- ★ AmeriCorps members may participate in events that advance community building objectives, including those with a fundraising aspect, but must comply with our policy that such activities: provide immediate and direct support to a specific activity, are not the primary activity of the program, and do not involve significant amounts of time. It is prudent in following the above guidance that AmeriCorps members not actually handle funds being raised. Providing information about ways to help is also acceptable as is garnering in-kind donations.
- ★ The provisions identify military service obligations as a compelling personal circumstance. If a member is called up for service in any of the military branches, the grantee will have the option of temporarily suspending the member for a period of up to two years, or of releasing the member for compelling personal circumstances and authorizing a pro-rated award. If a particular member has served less than 15 percent of the term, the member would not receive a pro-rated award, nor would the term of service count for purposes of maximum number of education awards or terms served.

What are the Corporation's special initiatives?

Over the years the Corporation for National and Community Service has supported certain service priorities that are described below.

USA Freedom Corps

The USA Freedom Corps is a major initiative by President Bush to promote citizen service in the United States and abroad. Coordinated through a White House council, it comprises AmeriCorps and SeniorCorps, which are administered by the Corporation for National and Community Service; a newly created Citizen Corps, overseen by the Federal Emergency Management Agency (FEMA) and focusing on the issue of homeland security; and the Peace Corps. By expanding opportunities in these programs, President Bush is fostering a culture of citizenship, service, and responsibility in the nation and making it

easier for every American to answer his call to devote the equivalent of at least two years of their lives in service to others. For more information, visit www.usafreedomcorps.org.

Martin Luther King, Jr. Day of Service

To support the Martin Luther King, Jr. Holiday, the Corporation, in collaboration with the King Center on Nonviolent Social Change, Inc., provides grants to public and non-profit organizations to mobilize Americans to observe the federal holiday as a day of service to others. All national service programs are encouraged to take this opportunity to lead or join their communities in service. This initiative is authorized under the National and Community Service Act. In 2001 and 2002, Best Buy Co., Inc., supplemented the Corporation's MLK grant funds. For more information or to register a service project, visit our website at: www.mlkday.org.

Unified State Plans

Unified State Plans are required by the National and Community Service Act of 1990, as amended. Under these plans, state commissions, state education agencies, and Corporation state offices, as well as other partners, set overall goals for service within the state. Partners identify strategies for accomplishing these goals.

For a number of states the planning process has brought together a range of partners including statewide nonprofit organizations, volunteer centers, volunteer membership organizations, and United Way agencies. Many states have achieved success with unified training, statewide service and volunteerism conferences, coordinated programming, and collaboration in achieving broad goals, such as those set forth for youth under America's Promise. This year states will revise their plans for a new three-year period. State commissions submit the plan.

America's Promise

The Corporation for National and Community Service directs a substantial amount of its resources--through the work of AmeriCorps, Learn and Serve America, and the Senior Corps-- to help improve the lives of young people. National service programs around the country have been leading partners with community volunteers and with America's Promise--The Alliance for Youth, an organization formed to carry out the five promises for young people: 1) an ongoing relationship with a caring adult--parent, mentor, tutor or coach; 2) a safe place to be with structured activities during non-school hours; 3) a healthy start; 4) marketable skills through effective education; and 5) an opportunity to give back through community service. The Corporation makes additional resources available to state commissions to advance the five promises for young people.

In 1998, as a commitment to improving the lives of young people in this country, the Corporation created the AmeriCorps Promise Fellows Program. AmeriCorps Promise Fellows serve full-time to spearhead efforts to deliver the five promises to children across the nation. Over the last three years, the Corporation has authorized approximately \$23 million in grants to support nearly 2,000 Fellows to serve in more than 40 states and the District of Columbia.

National Conference for Community Volunteering and National Service

Beginning in 1998 the Corporation for National Service joined the Points of Light Foundation as an annual partner in the National Conference for Community Volunteering and National Service. The conference is a premier training venue for national service leaders, state service commissioners, volunteer center directors and others committed to service. In 2000, through an expanded partnership with America's Promise and United Way of America, the focus of the conference was children and youth, particularly assessing progress, sharing best practices and recharging the engines to continue the campaign begun at the Presidents' Summit three years earlier and championed by America's Promise. In 2001, the focus of the conference was Celebrating the International Year of the Volunteer with training centered around examining our traditions, embracing our diversity, promoting innovative practices and providing the inspiration to continue to meet urgent community needs. In 2002, the theme will be Sharing the American Spirit.

Bridging the digital divide

The Corporation is working with local and national non-profits and private technology companies to create community-based and school-based computer learning centers so that all children and adults can keep pace with recent technological innovations. Through this initiative, AmeriCorps members and Learn and Serve participants teach computer skills to teachers, to youth and adults to enhance their employability, assess local technology needs, develop and design technology plans, and establish community Internet access sites.

A listserv on digital issues can be found at www.etr.org/nsrc.

Including people with disabilities as participants

The Corporation is committed to including people with disabilities in national service programs. To assess the readiness of programs to meet this commitment, the Corporation has provided a technical assistance grant to the Institute for Community Inclusion, University of Massachusetts, Boston. To promote inclusion, the Corporation also has:

- ★ issued three grants to organizations that support service events to include persons with disabilities in those activities
- ★ issued eight grants to participating disability and community organizations to support outreach to persons with disabilities to increase their involvement in national service, and
- ★ suggested reauthorization language that seeks to provide greater flexibility in the use of disability funds.

The Corporation has approximately \$3 million annually, generated from a mandatory set aside, to support this initiative.

SERVICE RECOGNITION PROGRAMS

Presidential Freedom Scholarships

Presidential Freedom Scholarships of \$1,000 are awarded to high school juniors or seniors who perform outstanding service to their community and submit a brief essay on the significance of that service in light of the events of September 11, 2001. The recipients are chosen by school officials, and must have given at least 100 hours of service in the past 12 months. All high schools in the U.S are eligible to choose two recipients. The Corporation provides \$500 towards each scholarship, which must be matched by the school or local community. For more information, call 866-291-7700 or visit www.student-service-awards.org.

The President's Student Service Awards

These awards recognize students who have contributed a substantial number of hours to their community. ANY student in kindergarten through college who serves at least 100 hours within a 12-month period is eligible to receive a Gold Award, while Silver Awards are given to students in kindergarten through eighth grade who serve at least 50 hours during a 12-month period. Winners receive a pin and a certificate signed by the President. For more information call 866-550-PSSA (7772) or visit www.student-service-awards.org.

National Service-Learning Leader Schools Program

This program recognizes high schools and middle schools each year for excellence in service-learning. Leader Schools receive no cash award but are asked to help other schools start or improve their service-learning programs during their two-year tenure. In 2002, 16 schools from 13 states were designated Leader Schools, joining 200 other schools who have held this title since 1999. For more information, call 800-638-8442 or visit www.leaderschools.org.

Disaster response

AmeriCorps*National Civilian Community Corps (NCCC) members and staff are part of the American Red Cross AmeriCorps National Disaster Response Network, and are trained and certified for CPR, first aid, damage assessment, and family assistance. Selected AmeriCorps members are also trained and certified by the U.S. Forest Service for forest fire fighting. In addition to the work of the AmeriCorps* NCCC, state commissions and local AmeriCorps programs are part of state-based disaster response systems. The Corporation has supported these disaster response programs by conducting workshops for national service programs interested in becoming involved in emergency management activities and working with several states to develop disaster response plans and systems.

Bringing new knowledge to national service: The National Service Fellowship Program

In the National Service Fellowship program (NSFP), talented individuals have made a unique contribution to the Corporation for National and Community Service through immersion in a particular topic that leads to a high quality work product. Since 1997, the NSFP has supported more than 50 research projects that

can enhance the quality of service delivery, increase productivity, identify best practices, and improve overall performance across the field of service. Fellows products have included in-depth studies, training materials, and other reports on a wide range of topics, such as diversity issues, training, recruitment, and welfare-to-work strategies.

The Fellowship program provides a unique niche for smaller-scale, more in-depth studies that can sometimes inform larger research efforts.

How can I apply for the program?

The Corporation is redesigning the program to support research on issues pertaining to the nonprofit sector. We hope to offer new fellowships under this new model in 2003-2004. Unfortunately, we will not be awarding Fellowships for the 2002-2003 year.

We will update our website site as the program takes shape. Please check our website periodically, <http://www.nationalservice.org/jobs/fellowships/index.html>. You may also contact us at fellowships@cns.gov, or 202-606-5000, ext. 571.

Where can I access Fellows' reports?

Fellows' reports are available from the following sources:

1. The Corporation for National and Community Service website:
www.nationalservice.org/jobs/fellowships/fellowsproducts.html
2. The National Service Resource Center: <http://library.etr.org> (type "Fellows" in the search engine).
3. Epicenter (Fellows findings submitted as best practices):
www.nationalservice.org/resources/epicenter.

Getting Started

What are my responsibilities as an AmeriCorps program director?

As an AmeriCorps program director, your responsibilities include—but are not limited to—recruiting and selecting members, supervising and training members, observing programmatic and fiscal responsibilities, facilitating members' end of service, and reporting to your contact agency.

You will also find the requirements for AmeriCorps programs in the following documents:

- ★ your AmeriCorps grant, issued by your state commission, your national parent organization, or the Corporation for National and Community Service, which includes all the special conditions applicable to operating your program;
- ★ AmeriCorps provisions;
- ★ applicable OMB circulars (referenced in your grant award);
- ★ Corporation regulations (by reference);
- ★ the National and Community Service Act of 1990, as amended (by reference);
- ★ your AmeriCorps proposal (application) and modifications to it that may have been negotiated with you; and
- ★ the budget for your program, which contains the maximum amount of funds the Corporation has provided for your program as well as your obligations to raise matching funds and/or in-kind contributions.

*The regulations and guidance in this handbook are specifically targeted to programs in AmeriCorps*State and National. Some regulations and guidance included in this handbook do not apply to the AmeriCorps Education Awards or Promise Fellow programs. Please consult the appropriate application and other specific guidance from the Corporation for National Service.*

What is my contact agency?

Your contact agency is the organization that issued your grant award. If you have questions about your grant or about running your program, you should first contact that organization. Some state commissions and parent organizations may also use the on-line Web-Based Reporting System (WBRS) to post policies and reporting due dates (check the “Policies” tab in WBRS).

Contact Agencies

If you are an:

Contact:

AmeriCorps*State program

your state commission
(see list on page 145)

AmeriCorps*National Direct Parent Organization

your program officer and
grants officer at the
Corporation for National
and Community Service

AmeriCorps*National Direct Project Site

your National Direct
Parent Organization (see
list on page 150)

AmeriCorps*Tribes and Territories program

your program officer and
grants officer at the
Corporation for National
and Community Service

AmeriCorps Education Awards Program, America Reads,
AmeriCorps Promise Fellows Program

your state commission,
National Direct Parent
Organization, or your
Corporation Program or
Grants officer, depending
on your award (see list on
pages 150-170)

The organization that signs your grant or agreement is the only organization authorized to change it. In some cases, state commissions and national parent organizations may need to obtain approval from the Corporation for National and Community Service on certain grant changes. If you have a direct grant from the Corporation, you must contact the Corporation program officer or grants officer assigned to your grant. The Corporation has no contractual relationship with sub-grantees and relies on the state commissions and national parent grantees to administer these grants.

Communication between national direct sites and state commissions

National direct operating sites are funded through a grant to their parent organization. However, the commissions in each state are charged with responsibility for coordinating all service in their state, and they consider national directs an important stream of service in the state. Therefore, it is the responsibility of each national direct operating site to maintain active communications with its state commission (parent organizations have information on contacting state commissions) and to keep the commission informed of pro-

gram progress. State commissions are also a good resource for information on statewide initiatives, training for members and staff, and information related to state-specific laws and benefits.

Site directors of national direct programs are:

- ★ required to place the state commission on their mailing list;
- ★ required to contact the state commission for participation in developing a unified state plan for service;
- ★ required to provide the state commission with a copy of the site narrative included in the program's application to the Corporation;
- ★ required to respond in a timely fashion to requests, invitations, and communications from the state commission; and
- ★ strongly encouraged to participate whenever possible in events, trainings, and meetings sponsored by the state commission.

What do I need to know about AmeriCorps programs before getting started? (RELATED AMERICORPS PROVISION 2)

In the following paragraphs you will find information about the AmeriCorps affiliation and other resources that will help you in starting your program.

AmeriCorps affiliation

The following components of national affiliation allow programs to maintain their important local identities while they benefit from the name recognition and positive reputation of the national network of AmeriCorps programs.

The AmeriCorps Ethic

The centerpiece of the AmeriCorps ethic is getting things done—improving communities by helping solve problems in the areas of education, public safety, the environment, and other human needs. The other key aspects of the ethic are strengthening communities and developing members' opportunities and civic responsibility. Your application included objectives in each of these areas, but it is important to reinforce this framework through orientation and training sessions, service-learning, and other special activities.

The AmeriCorps Member Application

Programs should select AmeriCorps members based on an application form and on interviews or references as the program deems appropriate. Programs are strongly encouraged to use the “model” AmeriCorps application, which may be supplemented with additional forms or materials. Applications may be obtained by calling the recruitment hotline at 1-800-942-2677.

The AmeriCorps Orientation

Orientation sessions for your staff, site supervisors, and members should include a discussion on the national scope of AmeriCorps. A great tool to use is the AmeriCorps orientation video, which is sent to each program at the beginning of the service year. The orientation should also include an explanation of how your local program fits into the AmeriCorps network of national service programs.

This and other information is contained in *Getting Started: A Guide for AmeriCorps Members* (formerly known as the *AmeriCorps Member Handbook*), which should be given to each member. *Getting Started* is available from ETR at 1-800-860-2684. Copies of the AmeriCorps orientation video are available from Mississippi Industries for the Blind. See order form on page 39. Member orientation is discussed in greater detail beginning on page 65.

The AmeriCorps Pledge

During the orientation, at the completion of pre-service training, or at another appropriate point, members should be asked to take 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.

Copies of the AmeriCorps pledge, suitable for distributing to members as a certificate, are available from Mississippi Industries for the Blind. See order form on page 39.

Common skills

To enhance members' ability to carry out the responsibilities that are part of the AmeriCorps ethic, programs are encouraged to provide AmeriCorps members with the opportunity to be trained in three basic skills—communication, conflict resolution, and CPR/First Aid.

Common events

Throughout the year, AmeriCorps members should have opportunities to come together for special events related to their service. This will remind them that they are part of a national network of programs, celebrate their accomplishments, and allow them to work with community volunteers, other AmeriCorps members and other national service participants such as Learn and Serve America students and volunteers in the National Senior Service Corps. Some events are designed to engage the broader community and leverage the work of unstipended volunteers. 2002 events include:

- ★ Martin Luther King, Jr. Day of Service (January 21, 2002)
- ★ National Volunteer Week (April 21-27, 2002)

- ★ National Youth Service Day (April 26, 2002)
- ★ AmeriCorps Graduation Ceremonies (June to August 2001)

For further information on these events, contact David Premo, Office of Public Liaison at (202) 606-5000, ext. 282, E-mail: DPremo@cns.gov.

For information about 2003 events, please go to www.cns.gov/partners/become/national_day.html.

Common connections

There will be many opportunities for representatives of different programs to share experiences and knowledge and for individuals from different parts of the country to become connected to programs outside of their home communities. Take advantage of them. For example, many cities or regions have Inter-Corps Councils (ICCs) composed of member representatives from local AmeriCorps projects. Contact your state commission for further information about the ICC in your area.

Commitment to service

An AmeriCorps member's commitment to service should not end when the year comes to a close. A handbook titled *Next Steps: Life After AmeriCorps* helps members reflect on their experiences with AmeriCorps, their future plans (education, career, etc.), and other opportunities to serve. Requests for copies can be sent by fax to ETR, the National Service Resource Center, at (408) 438-3618. ETR's phone number is (800) 860-2684.

One way for members to continue their commitment to service is to get involved with AmeriCorps Alums, the national alumni organization for former AmeriCorps members. AmeriCorps Alums can be reached at (202) 729-8180 or www.americorpsalums.org.

Common identification

In addition to AmeriCorps service gear (see page 30), there are many other ways in which the common look and affiliation may be advanced by programs. (Some of these items may be purchased with grant money.)

- ★ Members should identify themselves as AmeriCorps members and describe AmeriCorps appropriately.
- ★ Signs should identify sites as AmeriCorps project sites.
- ★ Program staff should be able to discuss AmeriCorps with visitors.
- ★ Stationery, brochures, fax cover sheets, and newsletters can identify the program as AmeriCorps, including the use of the logo.
- ★ Your community should be aware that the members are AmeriCorps members.
- ★ Press releases and other public materials should note that the program is part of the AmeriCorps national service network.
- ★ Logos may be downloaded at www.nationalservice.org/logos.

How do I refer to AmeriCorps members and to national service?

Consistent use of basic terms helps reinforce AmeriCorps common objectives and clarifies AmeriCorps for the public. Here are some frequently used terms related to AmeriCorps:

AmeriCorps members

AmeriCorps members should not be called *volunteers*, *workers*, *staff*, *participants*, or *employees*. The word *member* is lowercase.

AmeriCorps national service network

This term refers to all of the programs affiliated with AmeriCorps—including AmeriCorps*NCCC, AmeriCorps*VISTA, AmeriCorps*State and National, AmeriCorps*Tribes and Territories, the AmeriCorps Education Awards Program, AmeriCorps America Reads programs, and the AmeriCorps Promise Fellows Program.

living allowances

AmeriCorps members earn living allowances—not salaries or wages.

national service, community service

This term refers to any of the programs affiliated with the Corporation for National and Community Service. In addition to AmeriCorps, national service programs include Learn and Serve America and the National Senior Service Corps (the Foster Grandparent Program, the Senior Companion Program, and the Retired and Senior Volunteer Program). These different programs are also referred to as streams of service.

serve, service

When possible, *serve* and *service* should be used rather than *work* when referring to AmeriCorps members.

service-learning

“Service-learning is an educational method that engages young people in service to their communities as a means of enriching academic learning, promoting personal growth, and helping them to develop the skills needed for productive citizenship” (Dunlap, N.C., Drew, S.F. and Gibson, K. (1994) *Serving to Learn: K-8 Manual*. Columbia, S.C: South Carolina Department of Education).

USA Freedom Corps

A major initiative by President Bush to promote citizen service in the United States and abroad. Coordinated through a White House council, the USA Freedom Corps includes AmeriCorps, SeniorCorps, Peace Corps, and the new Citizen Corps, which focuses on homeland security. The initiative also includes

the President's call for every American to devote the equivalent of a least two years of their lives - or 4,000 hours - in service to others.

Names, phrases, and symbols to build national affiliation

The following names, phrases, and symbols can be used to help promote national recognition:

- ★ AmeriCorps
- ★ the AmeriCorps national service network
- ★ getting things done
- ★ AmeriCorps member
- ★ the AmeriCorps logo

The word *AmeriCorps* does not have to be included in a program's name; however, it can be used on key elements of the program's uniform, literature, and other materials.

What is an ethic of service?

To help create an esprit de corps for members, programs are encouraged to plan on the basis of "classes" of members who begin and "graduate" from their terms of service. Terms of service should generally begin in June, September, and/or January. If programs lose AmeriCorps members between classes, the Corporation encourages programs to fill those slots with members who have had appropriate orientation and training prior to beginning their term of service.

Appropriate opening ceremonies, including the administration of the AmeriCorps Pledge, are important for all members. Programs should also arrange for members to participate in other joint activities such as service days (such as the Martin Luther King, Jr. Day of Service) and conferences arranged by state commissions or by the Corporation.

The Corporation also asks grantees to identify their program as part of the national service network and as a program in which AmeriCorps members serve. This can be done through the use of AmeriCorps logos, common application materials, and other means. Grantees are not required to call their programs AmeriCorps programs, though all may use the AmeriCorps name along with their own program's name.

To help develop an ethic of lifetime service, programs are asked to provide opportunities for members to consider the meaning of the following line from the AmeriCorps pledge: "I will carry this commitment with me this year and beyond..." Many programs or states hold continuation of service conferences toward the end of AmeriCorps members' terms of service. The Corporation encourages all programs to arrange such opportunities.

How do I use the AmeriCorps logo?

Camera-ready logos, and logos on disk, are available from Mississippi Industries for the Blind for programs to use for service gear, stationery, signs, recruitment brochures, application forms, member curriculum and orientation materials, banners, press releases, and publications created by AmeriCorps members. In addi-

tion, logos can be downloaded for use from the Corporation's website at www.nationalservice.org/logos.

The AmeriCorps Promise Fellows Program uses a distinct logo that combines the AmeriCorps seal with the Little Red Wagon of America's Promise. Please consult the AmeriCorps Promise Fellows grant provisions for additional instructions on the use of the AmeriCorps Promise Fellows logo.

Restrictions on the use of the AmeriCorps logo

In order to preserve the AmeriCorps identity, you must obtain written permission from the Corporation if you wish to:

- ★ use the AmeriCorps name or logo on materials that will be sold;
- ★ use the AmeriCorps name or logo on clothing not worn by members or alumni;
- ★ alter the AmeriCorps logo or use it as a part of any other logo or design; or
- ★ allow a donor to use the AmeriCorps name or logo in promotional material.

Please contact the Office of Public Affairs at (202) 606-5000, ext. 535 for further information on the use of the AmeriCorps logo.

Use of the AmeriCorps name and logo by corporate sponsors

Donors to local programs may not use the AmeriCorps name or logo in advertising or other promotional materials without the written permission of the Corporation. Permission may be withheld if recognition of the donor is inconsistent with the Corporation's policies and objectives.

Using the AmeriCorps name and logo in publications

In addition to the many publications available from the Corporation for National and Community Service (such as handbooks, manuals, and recruitment and marketing materials), local programs often develop their own materials. To let others know of your affiliation with AmeriCorps, you may want to use the AmeriCorps name and logo in your publications. Publications that are distributed externally must include the following acknowledgment and disclaimer:

“This material is based upon work supported by the Corporation for National and Community Service under AmeriCorps Grant No. _____. Opinions or points of view expressed in this document are those of the authors and do not necessarily reflect the official position of AmeriCorps or the Corporation for National and Community Service.”

Programs also must ensure that the publication is consistent with grant provisions limiting member activities (for example, no lobbying or religious materials).

Please send two copies of each external publication (newsletters, recruitment materials, press releases, etc.) to the Corporation's Office of Public Affairs and your granting agency (if different from the Corporation).

How do I purchase AmeriCorps gear and affiliation items?

AmeriCorps members are encouraged but not required to wear official AmeriCorps service gear. Some type of identification is encouraged for purposes of local and national identity. In your AmeriCorps budget, you are allowed to allocate from \$35 to \$70 per member for official AmeriCorps service gear. (Additional safety apparel that is necessary for members to perform their daily service can be included in the budget to cover up to \$150 per member.)

The Corporation has contracted with Mississippi Industries for the Blind (MIB) for the warehousing and distribution of Service gear and national affiliation items. MIB will accept orders directly from programs and will ship from a central location. The program directly pays the supplier. Items can now be ordered online at www.nationalservicecatalog.org. (See MIB order form on page 39.)

Each AmeriCorps member could be provided a core package consisting of:

Qty	Item	Cost
1	AmeriCorps t-shirt Gray with logo and “Getting Things Done”	\$7.00
1	AmeriCorps sweat jacket Gray with logo and “Getting Things Done”	\$20.00
1	AmeriCorps cap Black	\$7.00
1	AmeriCorps lapel pin	\$1.00
2	AmeriCorps patches (one of each type) — Logo (round) — Getting Things Done (bar)	\$1.00 each
50	Business/ID cards (business cards can be laminated for use as IDs)	\$0.30 per sheet of 10
5	AmeriCorps decals (for hard hats, rain slickers, journals, etc.)	\$.10/each

For AmeriCorps Promise Fellows, the Corporation encourages programs to provide service gear with the AmeriCorps Promise Fellows logo available at MIB. (Note: The \$35.00 per member maximum does not apply for the AmeriCorps Promise Fellows program.)

Qty	Item	Cost
1	Promise Fellow Shirts Blue or white long-sleeve collar shirt with logo	\$36.00
1	Promise Fellow t-shirt Gray with logo and “Getting Things Done”	\$7.00-8.00

Local program items

Corporation funds may be used only for official AmeriCorps service gear—you may not include money in your budget request for a local program uniform. To the extent that you are identifying AmeriCorps on your local program uniforms, the cost of printing, decals, or patches may be included in your budget request.

National affiliation items

To increase awareness of your service and the local impact of AmeriCorps members, programs are encouraged to use project site signs, banners, and other items to designate service sites. You are encouraged to purchase at least one banner per operational site, one bag of buttons per 50 members, one package of bumper stickers, and two rolls of stickers. Project signs may also be purchased for permanent display at completed project sites.

For further information on AmeriCorps service gear and affiliation items, please contact the Office of Public Liaison at (202) 606-5000, ext. 278, or visit the catalog at *www.nationalservicecatalog.org*.

AmeriCorps and other National Service identity items

AmeriCorps and other National Service identity items are now available on-line at

www.nationalservicecatalog.org.

Promotional items include but are not limited to things like stickers, banners, site signs, pens and decals to identify your program and affiliation or promote a special day of service like MLK Day.

Uniform items for AmeriCorps are also available through the on-line catalog.

A printable version of the catalog and order form can be found on the website.

For problems printing the catalog or placing orders on line, please contact David Premo at (202) 606-5000 x282 or at *dpremo@cns.gov*.

How do I promote my AmeriCorps program?

Working with local media relations

One of the best ways to increase awareness and support for your program is to work effectively with your local media—to let people know about your service and accomplishments through coverage on TV, on radio, in newspapers, and in magazines. Contrary to popular belief, good news does get coverage, especially if you develop positive relationships with members of the press. Compelling and newsworthy stories include:

- ★ an excellent service project with demonstrable results;
- ★ a neighborhood or school being turned around by AmeriCorps members and residents;

- ★ a program's quick response to a natural disaster; and
- ★ a member whose life has been changed through participation in service.

The Office of Public Affairs has developed a handbook to promoting service through the media, *A Guide to Working with the Media*. If you don't have a copy, you can order one from ETR Associates at (800) 864-2684.

Coordinating with national media

The Office of Public Affairs is responsible for working with the national media—TV, radio, newspapers, and magazines—to promote AmeriCorps. In order to maximize national exposure of AmeriCorps, please coordinate outreach to the national press with Public Affairs (as well as notifying your contact agency listed on page 24). Statewide press should be coordinated with your contact agency.

Releasing names and photographs

Program directors must have the written consent of members before disclosing their names or photographs to the press or releasing personal information about them. (Member confidentiality is discussed further on page 90).

Sharing information about your program

It is important to share both good and bad news about your AmeriCorps program with your contact agency listed on page 24.

How good news is used

- ★ Stories are printed in the Corporation's newsletters, *AmeriCorps News* and *National Service News*, so that other programs can keep in touch and share important lessons.
- ★ Press is directed to excellent programs.
- ★ Outstanding AmeriCorps members may be invited to special events. Strong programs may be promoted as models.

Please be sure that you mail copies of every article about your program to your contact agency listed on page 24 and to the Corporation for National and Community Service Office of Public Affairs, which maintains a national clipping library of service articles.

How to handle bad news

Problems inevitably arise in the operation of every program. It is important that programs share their challenges with the contact agency listed on page 24 so the problem can be addressed quickly and effectively.

How to handle media inquiries

While it's important to respond to media inquiries quickly, don't hesitate to call your commission office, your Corporation program officer, the Office of General Counsel or the Office of Public Affairs before responding to questions from reporters. If you need guidance from Public Affairs, you can call:

Sandy Scott, Deputy Director of Public Affairs, (202) 606-5000, ext. 255.

What is the role of the Corporation's Office of Public Affairs?

The Offices of Public Affairs and Public Liaison have been merged into one office that coordinates the communication and the outreach and partnership efforts of the Corporation for National and Community Service and its programs. The staff works closely with the offices of the Chief Executive Officer, Chief Operating Officer, Intergovernmental Affairs, Recruitment and the program departments (including the field) to support and enhance efforts to reach out to external audiences and partners. Staff is organized around primary functions:

- ★ Media Relations
- ★ Marketing and Recruitment
- ★ Publications
- ★ Web site
- ★ National Initiatives
- ★ Martin Luther King, Jr. Day of Service
- ★ Awards and Recognition
- ★ Corporate, Foundation, and Non-profit Relations
- ★ White House Task Force on Faith-based and Community Initiatives

Recruiting Members

How do I develop a recruiting strategy?

(RELATED AMERICORPS PROVISION 6, AFP PROVISION 6, AEAP PROVISION 6.B)

This section is intended to give you some basic strategies that you can adapt to recruit members from your community and information on how you can tap into the national pool of applicants. More detailed information is available at www.americorps.org/resources.

Whether you recruit locally or nationally, you are encouraged to target your recruitment activities to as many audiences as are appropriate. Diversity is an important issue in recruitment, and can be represented in many ways: age, gender, sexual orientation, economic, education background, race and ethnicity, skills, and physical abilities.

First, take some time to plan your general recruitment strategy, which should include:

- ★ position descriptions for your members;
- ★ a list of target groups that may be able to fill the positions; and
- ★ ways to make sure that your target groups are aware of your organization and the positions available.

How do I identify potential AmeriCorps members?

Here are some sample groups and how to reach them. These suggestions may give you some ideas to apply to your own community.

Target Group: Recent Graduates/Young Adults:

Recent college and high school graduates, or others from the same age groups who are seeking personal satisfaction through service, are prime targets for a recruiting campaign. They are usually highly motivated and energetic individuals who may bring in new ideas and insights. Graduating from college and high school is a transitional time--when many are deciding what to do next and are available and open to service and relocating.

You can find them through

- ★ Boys and Girls Clubs
- ★ community colleges
- ★ high schools
- ★ housing complexes
- ★ other youth service corps

- ★ police internship programs
- ★ universities and colleges
- ★ college career services, college/university clubs--especially clubs that are related to your project, volunteer clearinghouses and service learning centers, campus newspapers and radio stations, fraternities and sororities related to service, and student centers.
- ★ vocational schools
- ★ YMCAs
- ★ youth civic groups
- ★ youth groups at places of worship

Target Group: Retired Citizens:

Individuals over the age of 50 make up a sizable portion of those committed to service across the country. They represent an extremely valuable resource, offering experience, wisdom, specialized skills, and time.

You can find them through:

- ★ AARP—local branches
- ★ Area Agencies on Aging
- ★ associations of retired workers and retired branches of professional societies
- ★ businesses that may share your information with retiring employees
- ★ libraries, especially those with special or early evening programs for seniors
- ★ National Service Senior Corps programs (Foster Grandparents, Senior Companions, RSVP). They can be reached through the Corporation for National Service office in your state.
- ★ senior church groups
- ★ senior educational programs (such as ElderHostel)
- ★ senior housing complexes and centers
- ★ visit joinseniorservice.org, a new recruitment website targeted to senior citizens

Other places to find members:

- ★ ethnic groups and organizations—e.g., local chapters of national organizations such as National Association for the Advancement of Colored People (NAACP), League of United Latin American Citizens (LULAC) or National Council of La Raza (NCLR).
- ★ local volunteer clearinghouses
- ★ nonprofit and voluntary organizations
- ★ offices of social services

- ★ places of worship
- ★ referrals from the National Referral Database (see next section)
- ★ retired teachers organizations and unions
- ★ tribal governments
- ★ vocational and magnet schools
- ★ vocational rehabilitation agencies
- ★ waiting lists of other AmeriCorps programs in your area

How do I develop a recruiting message?

Once you develop a list of target groups, think of different ways you can market or “sell” your AmeriCorps message to each group. Remember to vary your approach because not all people will respond to the same message. Below are some basic “selling” points:

- ★ appeal of AmeriCorps and service
- ★ give back to your community
- ★ gain job skills and career networks
- ★ travel/meet new people/adventure
- ★ deferment for qualified student loans
- ★ education award to pay off student loans or for graduate school
- ★ opportunity to apply education and experience to help communities

Target your materials. What would attract an applicant to your program? Applicants want to know what they’ll be doing and what they’ll gain from service as an AmeriCorps member. Target your approach to specific audiences. For example, if your project focuses on education, advertise to education majors the valuable classroom experience that they’ll gain as AmeriCorps members. Ask your current members to comment on your existing materials and give you either formal or informal reactions. Even though you don’t need to incorporate all of their comments you are likely to receive some helpful feedback.

Make it personal. Personal contact makes the difference. Use your alumni (or current members on non-service hours) to attend a state fair, conference, or school career day to share their experiences. Consider holding an information session with the contacts that you’ve made. Invite your current members, service alumni, and other members in the area to share their experiences and give potential applicants a firsthand account of your program.

Respond quickly and follow up. Keep a record of people you’ve sent applications to or who have requested further information. Follow up with them with a postcard, phone call, or e-mail to invite them to take the next step. Offer suggestions to them on completing the application.

Collaborate and ask for help. There may be other programs recruiting in your area--check with them and find out how you can combine mailings, or share space at events with other programs. They may even have a list of people they were unable to place who could be perfect for your program. Also network with other parts of the national service network, including National Senior Service Corps and/or Learn and Serve programs in your area.

Network. People often decide to do something because someone they respect or trust has suggested it. Ask local high school counselors, college placement officers, and community leaders to promote AmeriCorps and your program. Again, consider your target audiences and the attraction that your program would hold for them.

Order your materials. Use the AmeriCorps Material Request Form on page 39 to order the recruitment materials that you need.

What application form must I use?

The Corporation has created a standard application for AmeriCorps, which you are encouraged to use as the application for your program. If you have your own application, you are asked to accept the AmeriCorps application from potential candidates who have called the national AmeriCorps hotline. You are welcome to use your own supplementary materials. If requested, programs must make their forms available in alternative formats for individuals with disabilities. If you need copies of the AmeriCorps application, call (800) 942-2677; TTY: (800) 833-3722.

If your program has its own application form, it may be beneficial to include an area where an individual lists any other AmeriCorps experience. If an individual is selected for a third or more term of service not in keeping with Corporation policy and regulations, the program will be liable for any Corporation funds used to support that individual.

How do I use the online AmeriCorps recruitment and placement system (AC☆RPS)?

AC☆RPS, the web-based system for the recruitment and placement of AmeriCorps members, allows individuals to learn about AmeriCorps programs throughout the country, to search for programs based on selected criteria and to apply on-line. It allows programs to search for individuals based on select criteria and to contact these individuals via e-mail. Programs may also receive and approve applications on-line.

The AC☆RPS system is designed to generate interest in serving in AmeriCorps, to simplify the application process and to increase customer service to program staff and to potential applicants. A procedure is in place for potential members without internet access to become users by means of contract staff available via the toll-free number (800) 942-2677.

Please note, AC☆RPS Version 2.0 is currently under development. While most of this section will remain the same (Registration, Creating and Updating, Listings, etc.) substantial improvements will be made in areas where we have received your suggestions, such as: search functions to find potential members, e-mail notifications, additional status categories, better graphics, and much more. Notifications will be sent to all registered programs as additional features and functionality are developed, along with updated instructions and FAQs.

AmeriCorps Material Request Form

Fax To: (301) 519-5766

E-Mail To: AmeriCorps@aspensys.com



Ordered By:	
Date Ordered:	
Date Needed:	

Contact Name: _____
Organization: _____
Street Address: _____
City/State/Zip: _____
Phone: _____
Fax: _____

Special Instructions: _____
UPS Number : _____
FedEx Acct# : _____
 (Please provide account number for express delivery.)

Fulfillment Items:

A*Application Only	(CNA002)
A*Brochure	(CNA010)
A*Ed Award Flyer	(CNA053)
A*Spanish Brochure	(CNA008)
A* Application Packet	(CNK401)
A*Gatekeeper Poster	(CNA082)
A*Walk the Walk Video (1)	(CNA094)
Family Brochure	
Spanish Family Brochure	(CNA011)
Digital Divide Brochure	
A*Promotional Card	(CNA018)

A*NCCC Application Kit
 (CNK405)
A*NCCC Spanish Brochure
 (CNN104)
A*NCCC Fact Sheet
 (CNN124)
A*NCCC Member handbook
 (CNN118)

Corporation Information:
 CNS Brochure (CNS304)
 CNS Fact Sheet (CNS311)

Recruitment Tools:
 Talking About AmeriCorps Brochure (CNA005)
 Recruitment Manual (CNA006)

A*VISTA Application Packet
 (CNK408)
A*VISTA Brochure
 (CNV202)
A*VISTA Spanish Brochure
 (CNV201)
A*VISTA Radio PSA(CD/Kennedy)
 (CNV205)

(Some materials are available in alternative formats upon request.)

Completed By: _____ **Order#:** _____ **Date Completed:** _____ **Method:** _____

*** All orders are shipped by regular mail within 48 hours. If requesting UPS or FedEx, please provide account number and type of service in instruction box.

You can now register your program by visiting: www.americorps.org/resources. You will need your 14-digit program code or 8-digit VISTA project ID to register. Once you are a registered user, you can add your program listing, update an existing listing, and search for potential members.

Once you log on to AC☆RPS you'll be able to review listing information provided by other AmeriCorps programs. This may help you prepare your program listing information if you choose to participate in AC☆RPS. Participation in AC☆RPS is optional. You are strongly urged to participate, however, as AC☆RPS is a new resource for identifying prospective AmeriCorps members, both nationally and in your community.

Once you register your program, you will be contacted via AC☆RPS' automated e-mail communication any time an individual has applied to your program. We encourage you to respond to individuals, who use AC☆RPS to contact your program, as soon as possible. Most applicants will apply to multiple AmeriCorps programs, and a prompt response will enhance your chances of securing good candidates.

Operating Procedures for AC☆RPS

How do I log in and register as a user on AC☆RPS?

If you are the first person from your program to register, then go to the web and visit this site: www.americorps.org/resources/ then click on *Register*, which will take you to this screen:



Enter either your 14 digit program code (for all AmeriCorps programs other than VISTA) or 8 digit program code (for AmeriCorps*VISTA projects) and press enter. You must have a valid program code in order to register in AC☆RPS.

Note: If you don't know your AmeriCorps program code number, or if you are having difficulty following these instructions, please contact your cluster Recruitment Program Specialist for help. A listing of these individuals with their contact information is at the end of this document.

Enter the information requested in the above screen. Then click on the "Register" button. You should immediately receive a message like the example below:

Registration Confirmation

*User Jane Smith has been successfully created for ZZ312756. Thank you for registering with AmeriCorps On-line Recruitment System.
Now you can use your user ID logon to the AmeriCorps On-line Recruitment Site.*

You are now a registered user. Click “AmeriCorps On-line Recruitment Site.” It takes you to the AC☆RPS home page. You’ll see a copy of this page below.



On the bottom left side of this page, under the heading “Registered Users,” enter your user ID number and password. Now click on the “Log In” button.

The “Log In” button sends you to a screen which identifies your program and gives you four options:

Sample: Welcome “Program Name”

Please select one of the following activities:

- ★ Enter a **New Program Listing** or new opportunity, separate from your current listing.
- ★ **Find Prospects** by searching the interest profile database of prospective applicants based on criteria you identify.
- ★ Review and select applicants to your program, e-mail applicants, and make decisions on applications.

To change your password, **click here**.

How does a new person register on AC☆RPS?

- ★ For a new user (replacing an employee who left your program):

Send an e-mail message to the System Administrator at *admin@americorps.org*. Indicate “Registration change” on the subject line. The body of the email should contain the following:

Please change the registration for:

PROGRAM CODE: _____

PROGRAM NAME: _____

OLD USER ID: _____

NEW USER ID: _____

NEW USER NAME: (First) _____ (Last) _____

OFFICE PHONE NO. _____

USER EMAIL ADDRESS: _____

Once the System Administration gets this information, the old registration will be terminated and the new registration will be enabled.

- ★ For more than one user at your program:

Please send an e-mail message to the System Administrator at *admin@americorps.org*. Indicate “Additional users” on the subject line. The body of the email should contain the following:

Please add the following user(s) to the registration for:

PROGRAM CODE: _____
PROGRAM NAME: _____
OLD USER ID: _____
NEW USER ID: _____
NEW USER NAME: (First) _____ (Last) _____
OFFICE PHONE NO. _____
USER EMAIL ADDRESS: _____

The System Administrator will provide a temporary password for new and additional users that should be changed after the user’s first login.

How do I create a program listing?

If you are creating a listing for the first time, click on the “New Listing” button.

Provide the information requested on the screen. We hope that the data fields within the screen are self-explanatory. If not, click on the “HELP” button at the left of the screen.

When you save your program listing information for the first time, you will see that a program listing ID is assigned to this listing. The ID consists of your program code number followed by a dash and another number. Your first listing will be “- 0”. A second program listing would be indicated by “- 1,” a third listing by “- 2,” etc.

It is important that you keep a record of your program listing numbers. You’ll use these numbers when you want to edit this information at a later date.

Again, contact your cluster Recruitment Program Specialist if you need help on how to complete this page, or if you have questions about how to effectively present program information.

You need to **enter complete and accurate program data in AC☆RPS**. Multi-site programs may enter information about each site separately or may indicate all sites within one listing. You must use multiple listings if you are requesting applicants for more than one type of AmeriCorps program (for example, your organization supports both AmeriCorps*VISTA and AmeriCorps*State members). You also need separate listings for both full-time and part-time members. You may wish to use multiple listings for other reasons.

How can I update program information once it is listed on AC☆RPS?

You can update your program listing as often as necessary but we recommend at least once a quarter. Go to the “Update Listing” button on the Program user page. Click this button and AC☆RPS enables you to make changes to your program information.

You may want to change your listing to accommodate the following situations:

- ★ multi-site programs, which originally entered program information for each site, may later choose to merge multiple listings into one entry, or vice versa
- ★ some program information (such as start-date for member positions, timeframe for accepting applications, staff contact, etc.) has changed; all pertinent program changes should be updated in AC☆RPS.

Please note that if your program information is not updated within a 90-day time period, your cluster Recruitment Program Specialist may contact you. You will also receive an e-mail reminder message asking you to refresh your program information.

How can I find potential AmeriCorps members for my program?

We hope that AC☆RPS enables applicants to find you. But you can do your own searching. After you log in, click the “Find Prospects” button. You’ll come to a page that lists a number of criteria to search the AC☆RPS Interest Profile Database. This database contains information about AmeriCorps candidates who have given their permission to be contacted by AmeriCorps programs.

By designating specific applicant criteria and clicking the “Find Prospects” button at the bottom of the page, you’ll be provided with a list of candidates who meet the criteria you selected. You should be able to increase your pool of candidates by being less restrictive on the criteria you require. You may contact these individuals either by email or phone.

How will I know if someone has used AC☆RPS to apply to my program?

The e-mail address listed in your program registration will receive an e-mail message notifying you when someone has electronically applied to your program. This message will contain a registration number for the application.

SAMPLE e-mail message:

“Applicant Name” has submitted an application to your program. To access it, refer to Application Number MB995095647 at AmeriCorps On-line Recruitment Site. Please remember that many applicants apply for more than one program, so competition for these applicants might be keen. All applicants should receive a response from you within 10 days.

This message was automatically generated by the AmeriCorps On-line Recruitment System. Please do not reply to the sender.

When an applicant submits an application to one or more AmeriCorps programs the individual receives a confirmation message from AC☆RPS like the example below:

Application Confirmation

Thanks for applying for AmeriCorps. Your application has been submitted to the program(s) you selected, and your application number is SS123456789. Keep this application number in your records, as it will be the easiest method of tracking your application.

You should hear from the program(s) within 2-3 weeks. Most AmeriCorps programs have very small staffs, so thanks for your understanding and patience as the program officials work hard to balance the daily workload of managing a program with recruitment for the next members. If you have questions about your application or the program(s) or if there is a change in your application or availability, please contact the program(s) directly:

Program Name	Contact Name	Contact Phone	Contact E-Mail
<i>Safety Service Corps</i>	Edward Smith	(514)912-9002	esmith@erols.com
<i>Community Corps</i>	Linda Jones	(613) 123-4112	communitycorps@yahoo.com

Print out this form for your records, as it contains all program contacts. Good luck!

What are my responsibilities when someone uses AC☆RPS to apply to my program?

AC☆RPS is a competitive process. People can choose to apply to up to a maximum of ten programs at one time. **It is to your advantage to contact potential AmeriCorps members ASAP. Other AmeriCorps programs may also be interested in the same applicant.**

You must Log In to AC☆RPS and click “Select Applicants” to see a list of submitted applications. Click on the application number to view that application. You may print out that application for ease of review.

After your review of the application, if at any time you should decide to not select an individual, then go into AC☆RPS and click the “Reject” button. You should also call or e-mail the applicant to tell him or her of your decision.

After your review of the application, if you want this individual to join your program, click on the “Select” button. You should also call or e-mail the applicant to tell him or her of your decision.

The selected applicant must go back on line to the program selections page of his or her application and click on the accept button. At that point, other programs to which the applicant may have applied may not select the individual.

You also need to get from the applicant for your files a signed copy of the certification page from the application.

Added Steps For AmeriCorps*VISTA programs

First, please note that with the start of AC☆RPS, the Corporation no longer pre-screens or reviews any AmeriCorps*VISTA applications.

If you want this applicant for your program, you need to select the application as noted above. The applicant also has to go on line to accept, as noted above. You also need to send reference interview documentation and a completed Sponsor Evaluation Form to your State Office for review and approval. The State Office will use AC☆RPS to approve or disapprove your selection. The approval status will be visible to both the program and the applicant on the program selection page of the application.

Whom do I contact if I have recruitment problems?

Contact your cluster Recruitment Program Specialist

AmeriCorps Recruitment, Selection & Placement Staff

Staff Member Location/Phone & Fax Numbers

HEADQUARTERS

1201 New York Avenue, NW
Washington, DC 20525

Noel McCaman, Director

Room 8711 / (202) 606-5000 ext. 443
nmccaman@cns.gov Fax: (202) 565-2794

Kim Mansaray, Manager

Room 8708 / (202) 606-5000 ext. 249
kmansara@cns.gov Fax: (202) 565-2794

Jonathan Williams, Diversity Specialist

Room 8705-B / (202) 606-5000 ext. 442
jwilliams@cns.gov Fax (202) 565-2794

Denise Giles Yeager, Recruitment System Administrator

Room 8703-E / (202) 606-5000 ext. 213
dyeager@cns.gov Fax: (202) 565-2794

Kim Hammonds, Program Assistant

Room 8703-D / (202) 606-5000 ext. 539
khammond@cns.gov Fax: (202)565-2794

Gina Cross, Marketing Specialist

Room 8705-B / (202) 606-5000 ext. 154
Gcross@cns.gov Fax: (202)565-2794

Stacie Worrell, Student Intern
Room 8703-C / (202) 606-5000 ext. 540
SWorrell@cns.gov Fax: (202) 565-2794

ATLANTIC CLUSTER

**MAINE, MASSACHUSETTS, NEW HAMPSHIRE, RHODE ISLAND,
VERMONT ATLANTIC SERVICE CENTER**

801 Arch Street, Suite 104
Philadelphia, PA. 19107

Donna Palandro, AmeriCorps Recruitment Program Specialist
Office: (215) 597-3495
Dpalandr@cns.gov Fax: (215)597-0792

WASHINGTON, DC, DELAWARE, MARYLAND, PENNSYLVANIA

ATLANTIC SERVICE CENTER

801 Arch Street, Suite 104
Philadelphia, PA. 19107

Tim Tweed, AmeriCorps Recruitment Program Specialist
Office: (215) 597-2715
TTweed@cns.gov Fax: (215)597-0792

CONNECTICUT, NEW YORK, NEW JERSEY, PUERTO RICO,

VIRGIN ISLANDS ATLANTIC SERVICE CENTER

801 Arch Street, Suite 104
Philadelphia, PA. 19107

Merribeth Pentasuglia, AmeriCorps Recruitment Program Specialist
Office: (215) 597-7641
Mpentasuglia@cns.gov Fax: (215) 597-0792

SOUTHERN CLUSTER

**GEORGIA, NORTH CAROLINA, ALABAMA, MISSISSIPPI, VIRGINIA,
WEST VIRGINIA, KENTUCKY SOUTHERN SERVICE CENTER**

60 Forsyth Street SW, Suite 3M40
Atlanta, GA 30303-3104

Jolene Harrell, AmeriCorps Recruitment Program Specialist
Office: (404) 562-4082
jharrell@cns.gov Fax: (404) 562-4066

SOUTH CAROLINA, TENNESSEE, FLORIDA

SOUTHERN SERVICE CENTER

60 Forsyth Street SW, Suite 3M40
Atlanta, GA 30303-3104

Bob O'Harra, AmeriCorps Recruitment Program Specialist
Office: (404) 562-4053
roharra@cns.gov Fax: (404) 562-4066

SOUTHWEST CLUSTER

TEXAS, ARKANSAS SOUTHWEST SERVICE CENTER

1999 Bryan Street, Room 2050

Dallas, TX 75201

Homero Perez, AmeriCorps Recruitment Program Specialist

Office: (214) 880-7059

hperez@cns.gov Fax: (214) 880-7074

COLORADO, ARIZONA, NEW MEXICO, KANSAS

SOUTHWEST SERVICE CENTER

1999 Bryan Street, Room 2050

Dallas, TX 75201

Rachael Bambenek, AmeriCorps Recruitment Program Specialist

Office: (214) 880-7053

Rbambenek@cns.gov Fax: (214) 880-7074

LOUISIANA, OKLAHOMA, MISSOURI SOUTHWEST SERVICE CENTER

1999 Bryan Street, Room 2050

Dallas, TX 75201

Jennifer Clark, AmeriCorps Recruitment Program Specialist

Office: (214) 880-7058

Jclark@cns.gov Fax: (214) 880-7074

NORTH CENTRAL CLUSTER

Iowa, Michigan, Ohio North Central Service Center

77 West Jackson Boulevard, Suite 442

Chicago, IL 60604-3511

Courtney Nicholas, AmeriCorps Recruitment Program Specialist

Office: (312) 353-0574

Cnicholas@cns.gov Fax: (312) 886-5242

ILLINOIS, WISCONSIN, NEBRASKA NORTH CENTRAL SERVICE CENTER

77 West Jackson Boulevard, Suite 442

Chicago, IL 60604-3511

Alice Choi, AmeriCorps Recruitment Program Specialist

Office: (312) 353-8280

Achoi@cns.gov Fax: (312) 886-5242

MINNESOTA, INDIANA, NORTH DAKOTA, SOUTH DAKOTA

NORTH CENTRAL SERVICE CENTER

77 West Jackson Boulevard, Suite 442

Chicago, IL 60604-3511

Michael Bowen, AmeriCorps Recruitment Program Specialist

Office: (312) 353-1959

MBowen@cns.gov Fax: (312) 886-5242

PACIFIC CLUSTER

CALIFORNIA PACIFIC SERVICE CENTER

2201 Broadway Suite 510

Oakland, CA 94612-3024

Christina Corodimas, AmeriCorps Recruitment Program Specialist

Office: (510) 273-0172

CCorodimas@cns.gov Fax: (510) 273-0170

WASHINGTON, MONTANA, UTAH, NEVADA, WYOMING,

ALASKA, HAWAII, IDAHO, OREGON, TERRITORIES SOUTHWEST SERVICE CENTER

1999 Bryan Street, Room 2050

Dallas, TX 75201

Jennifer Clark, AmeriCorps Recruitment Program Specialist

Office: (214) 880-7058

Jclark@cns.gov Fax: (214) 880-7074

Denise Giles Yeager

1201 New York Avenue, NW

Washington, DC 20525

Office: (202) 606-5000 x213

National@americorps.org Fax: (202) 565-2794

Selecting Members

How do I select an AmeriCorps member for my program and what documentation is required?

First, you must make sure the potential member is eligible.

(RELATED AMERICORPS PROVISION—DEFINITIONS—I, APF PROVISION DEFINITION I, AEAP PROVISION DEFINITION H)

To be eligible to enroll in AmeriCorps, an individual must:

- ★ be a U.S. citizen or U.S. national or a lawful permanent resident alien of the United States;
- ★ be at least 17 years old (or at least 16 years of age if the member is out of school and a participant in a youth corps or a program for certain disadvantaged individuals); and
- ★ have a high school diploma or GED or agree to obtain one while serving.

Programs must ascertain and document the citizenship/ lawful permanent resident alien status of the members, a record of which should be kept in the member's file and should be noted on the member checklist in the Member Information Profile in WBRS. A program may be at risk if it has accepted self-certification as the only document for member eligibility.

Second, you must create a member file and include in it all the appropriate documentation.

Primary documentation of status as U.S. citizen or national. The following are acceptable forms of certifying status as a United States citizen or national:

- ★ a birth certificate showing that the individual was born in one of the 50 states, the District of Columbia, Puerto Rico, Guam, the U.S. Virgin Islands, American Samoa, or the Northern Mariana Islands;
- ★ an unexpired U.S. passport issued to an individual as a U.S. citizen;
- ★ report of Birth Abroad of a Citizen of the United States (U.S. Dept. of State Form FS-240);
- ★ certificate of birth—foreign service (U.S. Dept. of State Form FS-545);
- ★ certification of Report of Birth (U.S. Dept. of State Form DS-1350);
- ★ INS certificate of naturalization (INS form N-550 or N-570); or
- ★ INS certificate of citizenship (INS form N-560 or N-561).

Primary documentation of status as a lawful permanent resident alien of the U.S. The following are acceptable forms of certifying status as a lawful permanent resident alien of the United States.

- ★ Permanent Resident Card or Alien Registration Receipt Card (INS Form I-551)
- ★ an unexpired passport indicating that the INS has approved it as temporary evidence of

lawful admission for permanent residence; or

- ★ a departure record (INS Form I-94) indicating that the INS has approved it as temporary evidence of lawful admission for permanent residence.

Secondary documentation. If primary documentation is not available, the program must obtain written approval from the Corporation that other documentation is sufficient to demonstrate the individual's status as a U.S. citizen, U.S. national, or lawful permanent resident alien.

Please note that individuals who are in the United States under a student, work, or tourist visa are not eligible to become AmeriCorps members. Similarly, individuals who have refugee status but nothing indicating permanent resident alien status are not eligible to become AmeriCorps members.

What if a potential member has a criminal or juvenile record?

(RELATED AMERICORPS PROVISION 6.H, APF PROVISION 6.I, AEAP PROVISION 6.H)

Because the eligibility of individuals with criminal records has not been restricted, programs must make case-by-case determinations. However, if your program provides service in particularly sensitive areas, such as working with young children, you should consider whether the participation of individuals with certain criminal backgrounds would have a significant negative impact on the physical or psychological health of either members or individuals served. Similarly, programs should consider carefully the impact of participation by an individual convicted of a violent felony or an offense related to the project activities (for example, someone with a burglary record where the program repairs the homes of elderly residents). The same recommendations apply for someone adjudicated as a juvenile offender.

Programs should be aware that some states have laws related to placing individuals with criminal records in activities involving children. Programs could be held liable for any negative consequences resulting from inadequate screening of members in particularly sensitive areas. This also could affect a program's ability to obtain appropriate liability protection. Thus, the provisions require programs with members or employees who have substantial contact with children (as defined by state law) or who perform services in the homes of children or individuals considered vulnerable by the program, to conduct criminal record checks on these members or employees as part of the screening process, to the extent permitted by state and local law.

When enrolling members in WBRS, program directors must attest to these members' eligibility to serve under the age guidelines found in the AmeriCorps Grant Provisions. WBRS will automatically prompt users if such determination needs to be made and recorded on the Member Information Profile.

What are the guidelines for member classification and employee displacement?

(RELATED AMERICORPS PROVISION 6.F, APF PROVISION 6.F, AEAP PROVISION 6.G)

Members are not independent contractors. Members cannot be treated as independent contractors. They are enrolled in your program to perform direct community service. Programs are responsible for training and supervising members, for assigning service activities, for supporting and evaluating performance, for safeguarding safety, and for providing liability coverage.

Employee displacement (RELATED AMERICORPS PROVISION 31.G, APF PROVISION 30.C, AEAP PROVISION 30.C)

Programs may not permit a member to fill in for an absent employee. By law, members may not under any circumstances perform services, duties, or activities that had been assigned to an employee or to an employee who has recently resigned or has been discharged. Programs may not use a member in a way that will displace an employee or position or infringe on an employee's promotional opportunities.

A detailed list of prohibitions related to employee displacement is included in the Corporation's regulations (45 C.F.R. § 2540.100) and your grant provisions.

Programs may not select an employee, or previous employee, as an AmeriCorps member as described on the AmeriCorps Grant Provision §31c. If the program receives an application from a current or former employee, and wishes to select the individual as a member, the program must request a waiver from the AmeriCorps Program Office demonstrating that the member will be doing activities and serving in a capacity distinct from his or her prior employment.

While the prohibition on employee displacement does not apply to employment after a member's term of service ends, programs should not encourage members to cut their term of service short to become full-time employees of the program. This does not promote the ethic of service, hampers the program's ability to meet its objectives, and potentially makes the member ineligible to receive an education award.

Finally, while the Corporation will not apply the prohibition on employee displacement to situations in which a currently serving member wishes to work part-time for the program in a different capacity, programs must be aware that in hiring a currently serving member you may run afoul of federal or state wage and hour laws and be liable for paying minimum wage and time and a half overtime. You should check with the appropriate wage and hour authorities in your state to make that determination.

What special rules apply to team leaders?

The National and Community Service Act, as amended, provides for approved national service positions to include a "position involving service as a crew leader in a youth corps program or a similar position supporting a national service program that receives an approved national service position" 42 U.S.C § 12573(6). This language allows programs, in addition to youth corps, to use AmeriCorps members to provide an additional layer of leadership and support for members under certain conditions.

The following is guidance on the use of AmeriCorps members as Team Leaders. Because of the need to ensure that Team Leader functions and staff functions remain clearly distinct, Corporation program officers may request a description of Team Leaders' roles and responsibilities. Please use this memo as guidance in discussing Team Leader positions with your programs.

In general, all prohibited activities listed in Section 5 of the AmeriCorps Provisions apply to Team Leaders just as they do to all AmeriCorps members. Team Leaders are not permitted to act in a staff capacity. Supervising members is a staff responsibility. Team Leaders must not be responsible for program development and coordination, however, they may assist by providing information and resources on best practices or by helping to develop portions of the program such as the training curriculum. In essence, under no circumstances should an AmeriCorps member serving as a Team Leader be the individual legally responsible for the program or other members.

The Team Leader position description should predominantly include activities that involve them in performing direct service or providing support to members engaged in direct service.

Examples of *allowable* Team Leader activities:

- ★ working alongside members performing direct service, to serve as a model and to provide on the spot assistance;
- ★ training members;
- ★ providing guidance to members;
- ★ providing support to members, including reflection exercises, conflict resolution, advice for transitioning out of AmeriCorps, etc.;
- ★ arranging member development activities;
- ★ building a sense of esprit de corps and general team cohesion among members;
- ★ leading monthly/weekly meeting of members;
- ★ leading and facilitating team service projects;
- ★ working with the community to develop partnerships, including community volunteers, that will support the members' projects; and
- ★ communicating with program staff, site supervisors, and other members to ensure the execution of a quality program that is consistent with the AmeriCorps provisions.

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

- ★ raising funds or in-kind contributions in direct support of specific AmeriCorps projects, such as team service projects. See Section 5 of the AmeriCorps Provisions for greater detail regarding members and fundraising; and
- ★ participating in recruitment activities for new members.

Examples of *unallowable* Team Leader activities:

- ★ signing member timesheets;
- ★ evaluating member performance;
- ★ disciplining AmeriCorps members;
- ★ enrolling/dismissing AmeriCorps members;
- ★ writing and/or signing program reports;
- ★ managing the program's payroll and budget.

How do I accommodate members with disabilities?

(RELATED AMERICORPS PROVISION 6.D, APF PROVISION 6.D, AEAP PROVISION 6.D)

You are urged to reach out to members who can contribute a diverse set of perceptions, skills, and life experiences to the program team.

In all cases, your selection process must be based on the qualifications of the applicants and whether or not they can perform the essential project activities, with or without reasonable accommodation of their mental or physical disabilities. Programs and activities must be accessible to persons with disabilities, and you must provide reasonable accommodation to the known mental or physical disabilities of otherwise qualified members, service recipients, applicants, and program staff.

You must make all selections and project assignments without regard to the need to provide reasonable accommodation. You are not asked to enroll individuals who are unqualified or who pose a direct threat to the health or safety of others [that cannot be eliminated through reasonable accommodation], nor are you required to make accommodations that are unduly burdensome or will alter your program design fundamentally. However, you must prove and document any such findings or decisions.

Once an individual requests an accommodation, you should evaluate your ability to provide that accommodation. The first step is to talk to the person – find out what functional limitations exist and what essential functions need to be accomplished or what barrier exists to participation in the program or activity.

In many cases individuals will know what they need and how to secure it. In some cases, individuals will not be certain what they will need. There are several resources that you can call upon to assist you and the individual in evaluating appropriate and effective accommodations.

It is always a good idea to contact technical assistance resources when an individual requests an accommodation that involves getting or modifying equipment, or involves structural changes. There are resources that are expertly qualified to assist you.

- ★ The Disability and Business Technical Assistance Centers (DBTACs) are a federally funded resource that can assist you. They can be reached at (800) 949-9232 (voice/TTY).
- ★ The Job Accommodation Network (JAN) is another excellent resource that is available to you at no cost. JAN can be reached at (800) 526-7234 (voice/TTY).
- ★ Independent Living Centers (ILCs) are federally funded and located across the country and can provide you with assistance.

These resources are knowledgeable of effective, efficient accommodations. Often they can identify accommodations that are far less costly than – and often more effective than – can persons who are not experts in accommodation can identify.

ACCOMMODATION OF MEMBERS WITH DISABILITIES

SELF-EVALUATION CHECKLIST FOR GRANTEES

The following checklist is designed to allow grantees to readily assess major architectural features and facilities for accessibility. The checklist that follows is intended to allow grantees, when walking through their facilities and those of subgrantees or when visiting potential locations for meetings, conferences, training sessions, or events, to evaluate some of the most basic elements of accessibility without having to actually measure distances, slopes, forces, etc. Note: This is not a full self-evaluation; a more extensive checklist is available on the Corporation's website.

OUTSIDE THE BUILDING

Persons with mobility and vision impairments need accessible routes—smooth, non-slip, no protrusions or overhangs that can trip or bump them—from parking area, street, and/or bus stop. Persons with many types of physical impairments need parking spaces near entrances because walking distances is difficult or dangerous for them. Persons using wheelchairs or other mobility aids need parking spaces with an access aisle for opening car doors and loading/unloading equipment. Steps at the entrance to the building can be a barrier for persons with different types of mobility impairments.

Route:

- _____ Is the route to the entrance from parking or street smooth, not gravel, with no grade changes of more than half an inch, and no lengthwise grates more than half an inch wide where wheelchairs could get stuck?
- _____ Is the route wide enough for a wheelchair (36 inches—think yardstick)?
- _____ Are there curb cuts, with gently flared sides, where needed?
- _____ Think through the route someone using a wheelchair would have to travel. Is the route clear of protrusions or overhanging tree limbs not detectable with a cane? (Think about a basketball player using a cane.)

Parking:

- _____ Are accessible spaces reserved nearest the accessible entrance and on an accessible route?
- _____ Is an accessibility symbol on the parking space, mounted high enough so it is not hidden by a parked vehicle?
- _____ Is there an access aisle next to the space that is flat and at least five feet wide? (Remember that an average person, with arms outstretched, is six feet across.)
- _____ Is there an accessible route from the access aisle to the sidewalk or other accessible route?

Entrance:

- _____ Is a principal entrance located on an accessible route?
- _____ Is the entrance not a revolving door or turnstile?
- _____ Is there a flat surface on both sides of the door for maneuvering a wheelchair?
- _____ Is the door width at least 32 inches? (Think yardstick minus two closed fists.)
- _____ Is door hardware at a level reachable by someone using a wheelchair and is it push/pull or lever operated?
- _____ Is there a threshold no more than half an inch deep?
- _____ Does the door require no more than 8.5 pounds of force to open? (Think opening a refrigerator door.)
- _____ If there are steps, is there also a ramp to access the entrance? Is the ramp gently sloped, with handrails, no drop-offs, smooth surfaced with a level top and bottom platforms for resting and turning? Are doormats attached to the floor at all four corners? (Think trip hazards.)

INSIDE THE BUILDING

Persons who walk with difficulty or use wheelchairs, crutches, canes or walkers need a wide, smooth, level and firm surface. Persons who are sight-impaired need a path free of hazards. Persons with upper body impairments need non-twist knobs and handles and doors that are not too heavy. Persons with hearing impairments need visual elevator controls and persons with vision impairments need audible controls. Persons with mobility impairments need restrooms that they can get to and use easily and safely, and stairs with uniform tread and width and handrails to guide them and indicate landings.

Route:

- _____ Is there an accessible route connecting all parts of the facility that is wide enough for a wheelchair (36 inches—Think yardstick. Don't forget temporary barriers like boxes and chairs.)
- _____ Is carpeting low-pile, tightly woven, and securely fastened along edges? Are doors at least 32 inches wide? (Think yardstick minus two closed fists.)
- _____ Is door hardware at a level reachable by someone using a wheelchair and is it push/pull or lever operated?
- _____ Are doors no more than 5 pounds? (Think about the interior doors in your house.)
- _____ Is the route free of protrusions or overhanging obstructions not detectable by a cane? (Think a basketball player using a cane.)

Elevators/Stairs:

- _____ Do the elevators provide adequate maneuvering space and time to get to and enter the cab?
- _____ Is the elevator conveniently located, and does it have tactile controls and both audible and visual indicators for direction of travel and floors?
- _____ Are elevator controls reachable by a person using a wheelchair?
- _____ Do elevator doors remain open for at least three seconds?
- _____ Does the elevator stop at a level that is within half an inch of the floor?
- _____ Are stair step heights uniform, with uniform depths of at least 11 inches and no overhangs greater than 1.5 inches?
- _____ Are handrails continuous from the top to the bottom floor, without stopping at landings?

Restrooms:

- _____ Is at least one restroom on an accessible route and identified by accessibility symbols(s)?
- _____ Does the restroom have doors 32 inches wide, non-twist knobs and handles, adequate maneuvering space at the entrance, in the restroom, and in the stalls (preferably at least five feet by five feet)?
- _____ Is the toilet high (17 to 19 inches) and located no more than 18 inches from the center of the toilet to the closest wall? (Think tile dimensions—4 inches square, 4 inches by 6 inches, or 8 inches square).
- _____ Do urinals have elongated rims and clear floor space in front?
- _____ Are fixtures located so as to be usable by a person using a wheelchair?

Emergency Warning Signals:

- _____ Are both visual (flashing) and audible warning signals provided?

Assembly, meeting, and Conference Areas:

- _____ Are level wheelchair spaces available on an accessible route, with a variety of unobstructed view of the stage?
- _____ Are auxiliary listening systems, with volume controls, wireless headphones, infrared—audio loops and radio frequency—available for persons with hearing impairments?

Drinking Fountains:

- _____ Are the fountains low enough so someone using a wheelchair can use them? (Think 36 inches or a yardstick.)
- _____ Is there access space in front?
- _____ Are the controls operable with one hand without grasping or twisting?

Telephones:

- _____ Are public telephones located on an accessible route, with clear floor space and located low enough for use by a person using a wheelchair?
- _____ Do the phones have push button controls?
- _____ Do they offer volume controls?
- _____ Do they offer TTY service?
- _____ Are telephones for employees and participants modified to meet their specific needs?

Picnic Areas:

- _____ Are tables available with one end extended or with a portion of a bench removed that area on an accessible route?
- _____ Are grills and trash receptacles at an accessible height and do grills have rounded corners so they are not a safety hazard to visually impaired persons?

Exhibits, Signs, and Information Displays:

- _____ Are they adequately lighted, in high-contrast colors, in large, easy-to-read print, and at levels where the material may be read by short persons or persons using wheelchairs?
- _____ Do tactile objects allow persons with visual impairments to enjoy exhibits and displays? Is audio information available to persons with hearing impairments in some other format?

Note: Especially when reserving hotel space, be aware that persons with disabilities require a variety of services. Some require a TTY telephone. Others require roll-in or sitting showers or lounge chairs instead of flat beds. Some require accessible restroom facilities. Always notify meeting, conference, or event participants that reasonable accommodations will be provided upon request and provide a date and contact for making such requests.

Are there times I do not need to provide accommodations?

In a few cases, you may receive requests for accommodations that you believe are unduly disruptive to your program or are too expensive. Under the Rehabilitation Act and the terms of your grant or agreement with the Corporation, you must provide accommodation, upon request by a qualified individual with disabilities, unless doing so is an undue financial or administrative burden to your program. This is a very high standard. Not being easily achievable does not meet this standard. Being difficult to achieve, time-consuming, or costly, do not meet this standard.

In addition, there are many factors that go into evaluating the obligation to provide accommodations.

- ★ Undue administrative burden means the accommodation will alter the fundamental nature of your program. For example, adjustment of hours is often a form of reasonable accommodation. However, you must carefully consider the circumstances and the legal requirements when adjusting hours for participants. AmeriCorps State/National programs have statutory requirements regarding service hours, and changes to hours that violate these requirements "alter the fundamental nature of the program." Therefore, these changes are not required for reasonable accommodation and providing them may violate the Corporation's statute.

You must first determine if your program has consistently applied these requirements to all your participants. Strict adherence to the legal requirements to deny a person an accommodation for his or her disability when flexibility is allowed for others is discrimination because of disability.

If consistently applied, the following scenarios would alter the fundamental nature of the program:

- (a) a full-time AmeriCorps State/National/NCCC member who is not required to work 1700 (or a higher minimum established by the program);
- (b) an AmeriCorps VISTA who is not available for service 24 hours a day, 7 days a week, in the same manner as other AmeriCorps VISTAs at that site or within that state; and
- (c) an AmeriCorps member who extends the time within which to complete the requisite number of hours. NOTE: There are ways to work around a fundamental alteration in the 12-month completion requirement. If a person with a disability needs time off for extensive medical treatments, hospitalization, etc. or is unable to serve full time for a period, options are:
 - They can be put on a non-disciplinary suspension for the period, with that time added to the end of the current service period. This allows the person to complete the full term of service and obtain the education award. It makes no difference if this puts their completion date after the end of the grant cycle. However, the participant cannot receive a living allowance during this period.
 - There may be circumstances under which they can be converted to part-time status. This is dependent on program design and may affect the individual's member benefits.
 - They can be released for compelling personal circumstances. This allows them to receive a prorated education award.

- ★ Undue financial burden considers many factors, including:
 - (a) The overall size of your entire organization (not just your national service or volunteer program) – numbers of employees and participants; number and type of facilities; and size of budget.
 - (b) The type of your operation, including the composition and structure of your entire organization’s work force and service force.
 - (c) The nature and cost of the accommodation needed.

In all cases, if you fail to provide a reasonable accommodation when requested by a qualified individual with disabilities and claim undue burden, the onus is on you to fully justify your undue burden claim.

In some cases, there are funds available from the State Commissions to assist you in paying for accommodations. These funds may not be used to assist you in meeting basic accessibility and accommodation requirements, but they can be used to make your program more accessible than the minimum requirements mandate. Therefore, if providing an accommodation would be an undue financial burden for your organization, these funds may be available. Contact your State Commission for more information.

How does a member file a disability discrimination claim?

Every grantee of the Corporation is required to have a grievance procedure for resolving disputes by participants. Except for AmeriCorps*VISTA, your grievance procedure may include or exclude discrimination claims (failure to provide reasonable accommodation is a discrimination claim, and AmeriCorps*VISTA excludes all discrimination claims from its grievance process). Regardless of your decision in this regard, any participant may file a discrimination claim with the Corporation’s Office of Equal Opportunity. That Office can be reached at (202) 606-5000, ext. 312 (voice), (202) 565-2799 (TTY), (202) 565-2816 (FAX), or eo@cns.gov.

If you choose for all discrimination claims to be filed under your grievance procedure, it is recommended that you call upon the expertise of colleagues in the disability community to assist you in evaluating grievances.

Providing accommodations can range from the very simple to the very complex and sometimes requires expertise in disability issues or legal issues. It is always advised that you check with disability organizations in your community or with the national resources we have provided.

By far, the vast majority of accommodations are inexpensive. For those limited cases where reasonable accommodations are more costly, the Corporation has a limited amount of money available through state commissions to provide accommodations for service members. By statute, only subtitle C competitive State and National Direct AmeriCorps programs may use these funds; they are not available for formula programs or subtitle H programs such as the AmeriCorps Education Awards and AmeriCorps Promise Fellows Programs.

The Institute for Community Inclusion, University of Massachusetts, Boston can provide technical assistance to programs concerning the issues discussed in this section. You may reach them at (617) 355-4788 or view their website at www.serviceandinclusion.org. The website contains valuable information for your program.

The President's Committee on Employment of People with Disabilities operates a toll-free, confidential, free resource for employers on reasonable accommodation requirements and options for accommodating employees at (800) 526-7234 (voice/TDD), e-mail at JAN@jan.icdi.wvu.edu, or website at www.pcepd.gov.

How do I enroll members?

After you have selected your members:

- ★ Have members fill out National Trust Enrollment Forms, make a copy for the member file, and send signed and completed forms to the contact agency listed on page 24. A sample enrollment form is in the back of this handbook in the Appendix Section.

OR: If you are using WBRS: Have members fill out National Trust Enrollment Forms. Keep the signed original in the member file and complete the online version in WBRS to officially enroll the member in the Trust.

- ★ Enroll eligible members in health care.
- ★ Enroll eligible members in child care.
- ★ Have eligible members fill out loan forbearance forms.
- ★ Document U.S. citizenship, U.S. national, or lawful permanent resident alien status.
- ★ Document criminal background check.

How do I implement the new policy on over-enrollment?

Upon request and approval, grantees, other than Education Award Programs, may enroll up to 20% more than the member ceiling established in the grant award in order to take account of attrition.

Follow these steps when implementing the recently approved policy on over-enrollment.

1. File a request to over-enroll with the State Commission or Parent Organization.
2. The State Commission or Parent Organization staff then creates a **slot correction form** and forwards this WBRS document, with comments supporting the over-enrollment request.
3. The slot correction is forwarded directly to the Grants Officer at the Corporation for National and Community Service to open and approve.
4. The Grants Officer then notifies the Commission that the correction has been approved.
5. The subgrantee can then over-enroll members in the new slots after receiving notification from the Commission or Parent Organization.

6. If a program finds that at the end of the program year, it underestimated its attrition rate and as a result more members are enrolled than the approved budget allowed for, the program is responsible for all living allowance match and operating costs needed to support the members *in excess* of the approved grant award. However, the Corporation can approve requests for additional education awards. In those circumstances, grantees should submit a written request, with a brief justification, to the Corporation's program officer. Refer to the June 13, 2001, memo to grantees from Peter Heinaru.

A useful checklist for all the procedures required for getting your member started appears on the next page.

Checklist for Getting Members Started

BACKGROUND CHECK

Background criminal record checks are required, to the extent permitted by state law, for members who have substantial direct contact with children (as defined by state law), or who perform service in the homes of children or individuals considered vulnerable by the program. It often takes a long time to get the results, so complete this task as soon as possible.

CHILD CARE

- ★ Call AmeriCorps Care at (800) 570-4543 to request a program director's packet.
- ★ Program directors must verify the eligibility of members to receive child care.

DOCUMENTATION OF CITIZENSHIP AND AGE

Make a copy of one of the items below, have member sign to certify, and place in the member's file.

For U.S. citizen or U.S. National:

- ★ A birth certificate showing that the individual was born in one of the 50 states, the District of Columbia, Puerto Rico, Guam, the U.S. Virgin Islands, American Samoa, or the Northern Mariana Islands;
- ★ A United States passport;
- ★ A report of birth abroad of a U.S. Citizen (FS-240) issued by the State Department;
- ★ A certificate of birth-foreign service (FS-545) issued by the State Department;
- ★ A certification of report of birth (DS-1350) issued by the State Department;
- ★ A certificate of naturalization (Form N-550 or N-570) issued by the INS; or
- ★ A certificate of citizenship (Form N-560 or N-561) issued by the INS.

For lawful permanent resident alien:

- ★ A Permanent Resident Card or Alien Registration Receipt Card (also known as the Green Card) (Form I-551) issued by the INS;
- ★ A passport indicating that the INS has approved it as temporary evidence of lawful admission for permanent residence; or
- ★ A Departure Record (Form I-94) issued by the INS, indicating that the INS has approved it as temporary evidence of lawful admission for permanent residence.

NOTE: Individuals who are in the United States under a student, work, or tourist visa or under some other temporary status are not eligible to become AmeriCorps members.

ENROLLMENT FORM

Have each member complete and sign the National Service Trust Enrollment Form. Keep the signed original in the member's file and complete the online version in WBRS. WBRS automatically submits the form to the National Service Trust.

FORBEARANCE REQUEST FORM

The federal Education Loan Forbearance Request form is used to request the postponement of repayment of qualified loans.

HEALTH INSURANCE

- ★ Make sure you have health insurance for all eligible members.

ALTERNATIVE HEALTH PLAN

(If you have not already done so, send a copy of your insurance coverage to your contact agency listed on page 24.)

MEMBER CONTRACT

Before members begin their service, they must sign a member contract that is specific to their program. Many programs go over the contract at the orientation. One copy should go to the member and one copy should be kept in the member's file.

GRIEVANCE PROCEDURES

A signed copy of the grievance procedure should be included on each member file.

MEMBER FILES

Documentation of member information is an essential part of record keeping. Creating a system at the beginning of the year will help you in quickly accessing the data you need.

SERVICE GEAR

AmeriCorps service gear can be ordered from the Mississippi Industries for the Blind. (See order form on page 39.)

What do I need to know about member files?

(RELATED AMERICORPS PROVISION 14 & 16.B, APF PROVISION 14, AEAP PROVISION 14)

You should create a file for each one of the members participating in your program. In the file you should keep documentation about your member's application, eligibility, contract, time sheets reflecting service hours, performance evaluations, grievance procedures, exit forms, and all other relevant information about your members.

You must be able to show that every member was eligible to enroll in AmeriCorps and to receive in-service benefits and an education award upon completion of the term of service. You are required to certify each member's enrollment, number of hours of service performed, and completion of a term of service. Your records must show that a member performed the hours of service included on the certification, and that the member completed the term of service required in his or her contract.

Supervisors and program directors should conduct periodic reviews of member files to ensure that service hours are being accurately tracked, and that member files are current and complete. Moreover, you must develop record retention policies and procedures that meet the requirements of the grant provisions and your granting agency.

Documenting eligibility

To document eligibility, you should keep records on the member's:

- ★ citizenship or lawful permanent resident status;
- ★ birth certificate;
- ★ social security number;
- ★ birthdate;
- ★ enrollment form with signed certification by the member regarding the highest level of education achieved, age, and citizenship;
- ★ start and end dates;
- ★ documentation of personal compelling circumstances (if member has earned a pro-rated education award); and
- ★ hours of service (supported by timesheets and signed by the member and his or supervisor). WBRS time logs must show that a member performed the hours of service included on the end-of-term certification.

Your documentation must also show that the member completed the terms of service required in the member contract.

Documenting performance

You also should keep official member files, including each member's:

- ★ signed application form
- ★ signed member contract
- ★ position description
- ★ performance evaluations
- ★ documentation of any disciplinary action
- ★ information for use in program evaluations
- ★ site agreements
- ★ signed grievance procedure

How do I plan a member orientation session?

Member orientations are necessary for preparing your members to begin their terms of service.

In order to facilitate this learning process, programs are strongly encouraged to present materials in multiple formats. In particular, program rules, including prohibited activities, should be presented orally as well as in writing, with opportunities for discussion and questions.

Core topics for initial member orientation should include, at a minimum:

National service: the big picture

(The AmeriCorps orientation video, "Getting Things Started," is a good tool, and can be obtained from the Mississippi Industries for the Blind. See order form on page 39.) Give an overview of the history and nationwide importance of national service by reviewing:

- ★ The history of service in America
- ★ The AmeriCorps network of over 900 programs and more than 50,000 members
- ★ A discussion of the AmeriCorps ethic
- ★ The importance of getting things done
- ★ The meaning of community
- ★ The doors of opportunity that will open through service
- ★ The responsibilities that individuals have to themselves, their families, their community, and the nation

Program rules, regulations, and benefits

Distribute the member handbook and discuss sections such as:

- ★ Drug Free Workplace Act
- ★ Sexual harassment and other discrimination issues
- ★ Grievance procedure
- ★ Safety protocol
- ★ Prohibited activities
- ★ Rules of conduct
- ★ Suspension
- ★ Making up missed service hours
- ★ Program operating policies
 - Timesheets (signed by member and supervisor)
 - Travel policies
 - Expense reimbursement
 - Benefits
 - Living allowance
- ★ Staff and member roles
- ★ The objectives of the program and how to collect data for evaluation purposes
- ★ Background information about the community or natural environment.

What should members' training include?

(RELATED AMERICORPS PROVISION 7, APF PROVISION 7.C, AEAP PROVISION 7.C)

Programs are required to provide members with the training, skills, and knowledge they need to perform well in their assigned service project. Training should be an ongoing part of your program. You should use service experiences to help members improve their skills, internalize project goals and increase their insight. In addition, training should reinforce AmeriCorps information, including prohibited activities.

Programs as a whole must allocate at least 80 percent of the required participation to direct service activities and no more than 20 percent of the aggregate required service hours to education, training, and other non-direct service activities. This rule applies to programs as a whole and not to individuals. Thus, there can be minor differences among members in how much time they spend in non-direct service activities. However, members should not be assigned to administrative duties unless incidental to the service activities. **(Note: The 80 percent/20 percent split between direct service and training hours does not apply to AmeriCorps Promise Fellows and Education Award grantees.)**

Examples of training for assigned service activities:

- ★ skills training (such as tutoring, mentoring, giving immunizations, etc.)

- ★ working with volunteers
- ★ cross-cultural sensitivity
- ★ team building

Examples of training to develop members (these are suggested topics—each program will determine their own training needs):

- ★ citizenship training
- ★ cross-cultural sensitivity
- ★ communication
- ★ accommodation of persons with disabilities
- ★ conflict resolution
- ★ resume writing
- ★ CPR/first aid
- ★ life after AmeriCorps

Who are the training and technical assistance providers available for AmeriCorps programs?

Training and technical assistance to programs

The Corporation has agreements with 16 national training and technical assistance (T/TA) providers to help meet programs' training and technical assistance needs. To maximize the impact of this investment, the Corporation uses a "train-the-trainer" approach and does not generally train AmeriCorps members directly. Training and technical assistance for staff and members is also provided to programs by the state commissions. Requests for T/TA can be made at any time by directly telephoning your state commission or national direct parent organization. In some instances your state commission or national direct parent organization may encourage you to contact national T/TA providers directly.

The Corporation provides support in a number of areas including, but not limited to, organizational development, recruitment program management, supervision, financial management, sustainability, evaluation, strategic planning, and diversity. It also helps programs meet managerial and skill-building needs in the areas of education, environment, public safety, and fully including people with disabilities.

Types of Assistance

Various types of T/TA services are available. The services include:

- ★ Workshops and conferences
- ★ On-site consultations
- ★ Peer exchange opportunities-in person, on the phone, and on-line
- ★ Informational materials drawn from the best in the field
 1. Sample forms
 2. Guidelines and checklists
 3. Easy-to-use training curricula
 4. Bibliographies of best practices
- ★ Phone consultations and troubleshooting
- ★ On-line consultations

On-site consultations are the most expensive form of technical assistance. Requests of this kind are reviewed by the state commission or national direct headquarters, by the Corporation program officer, and by the T/TA staff to ensure that this is the most effective method for meeting the need. A list of current T/TA providers is included in the appendix.

Corporation T/TA Staff

If you wish to speak with T/TA staff at the Corporation for National Service, call (202) 606-5000:

T/TA Officer	Assignment Area	Provider Portfolio	Program Liaison
Jewel Bazilio-Bellegarde	South Cluster	Human Relations/ Diversity	Disabilities AC/VISTA
David Bellama	Atlantic Cluster	Sustainability	Tribes Learn and Serve
Gina Fulbright-Powell	Southwest Cluster	Financial Mgt. Program Development	AC/National
Margie Legowski	Education Sector	Education/LEARNS	Senior Corps
Tom Lenhard	North Central Cluster	Training Design Member Development Civic Engagement	AC/ NCCC
David Miller	Environment	National Service Resource Center	
Susan Schechter	Pacific Cluster	Project TASC	AC/State

The T/TA fax number is (202) 208-4151.

Effective Practices Information Center (EPICENTER)

www.nationalservice.org/resources/epicenter

The Corporation for National and Community Service sponsors the Effective Practices Information Center (EPICENTER), a searchable, online database of effective program practices. The goal of the epicenter is to support practitioners in developing sustainable programs that lead to positive outcomes, by making ideas and information widely available across the national service network.

The database is updated frequently and contains practices related to education, public safety, the environment, and other human needs, along with service-learning and common program management topics (e.g., recruiting, volunteer management, sustainability). Information in epicenter draws upon the experience of program practitioners, the efforts of technical assistance providers or resources specialists, and findings from program evaluations.

This technical assistance resource is located at *<http://www.nationalservice.org/resources/epicenter/>*.

If you have questions about the site, contact:

EPICENTER project manager

E-mail: *dmiller@cns.gov*

Voice (202) 606-5000 x 491

TTY: (202) 565-2799

EPICENTER staff

E-mail: *epicenter@etr.org*

Voice: (800) 860-2684 x100

TTY: (831) 461-0205

Training and Technical Assistance

National Provider Information

Service Category Services Provider

PROVIDER ORGANIZATION	PROVIDER CONTACT	T/TA MANAGER
<p>Disability Issues</p> <p>Purpose: to provide training and technical assistance services to Corporation-funded programs aimed at increasing the successful inclusion of people with disabilities in national service. Services focus on providing information, resources, training and technical assistance on disability awareness issues; reasonable accommodation; the knowledge and understanding of applicable federal and state regulations; building national, state and local networks of disability resources; and on any issues that may arise in relation to ensuring quality national service experiences for persons with disabilities.</p>	<p>The University of Massachusetts Boston, Institute for Community Inclusion (ICI)</p> <p>Ms. Paula Sotnik 100 Morrissey Blvd. Boston, MA 02125-3393 Tel: 617-355-4788 Fax: 617-355-7940 <i>paula.sotnik@TCH.Harvard.edu</i></p>	<p>Jewel Bazilio-Bellegarde (202) 606-5000 x452 <i>jbazilio@cns.gov</i></p>
<p>Educational Success</p> <p><i>www.nwrel.org/learns</i></p> <p>Purpose: to provide program staff with the skills and resources to effectively design and implement high quality education programs with particular emphasis on literacy, out of school time and mentoring programs for youth. Assistance includes a limited number of state-based education forums and training of trainer tracks in such areas as preschool and family literacy, tutor training, tutoring program start up, and literacy assessment. TA resources include a web site of downloadable education and tutoring resources.</p>	<p>LEARNS/ Northwest Regional Educational Laboratory (NWREL)</p> <p>Nancy Henry 101 SW Main Street Suite 500 Portland, OR 97204 Tel: 503-275-9611 Toll Free: 800-361-7890 <i>henryn@nwrel.org</i></p>	<p>Margie Legowski (202) 606-5000 x457 <i>mlegowsk@cns.gov</i></p>

PROVIDER ORGANIZATION	PROVIDER CONTACT	T/TA MANAGER
<p>Evaluation TA <i>www.projectstar.org</i></p> <p>Purpose: to assist Corporation-funded programs with all aspects of the evaluation process, including writing outcome-based objectives, developing evaluation plans, analyzing data, and reporting results. Assistance is provided through state and regional workshops, on-site visits by trained evaluation coaches, toll-free telephone consultation, newsletter, evaluation Tool Kit, resource library, and internet website.</p>	<p>Project STAR/Aguirre International Ken Terao 480 East 4th Ave, Unit A San Mateo, CA 94401 Toll free: (800) 548-3656 <i>kterao@aiweb.com</i></p>	<p>Lance Potter (202) 606-5000 x 448 <i>lpotter@cns.gov</i></p>
<p>Faith-based and Small Community-based Organizations <i>www.ncpc.org</i></p> <p>Purpose: to increase opportunities for faith-based and small community-based organizations to use services as a strategy in their programs and projects. The provider will help national service grantees and programs to reach out to these organizations and will assist such organizations in learning about opportunities available through the Corporation.</p>	<p>FACES (Faith and Communities Engaged in Service) Colleen Minson 1000 Connecticut Avenue, NW, 13th Floor Washington, DC 20036 Tel: (202)261-4129 <i>cminson@ncpc.org</i></p>	<p>Susan Schechter (202) 606-5000 x461 <i>sschecht@cns.gov</i></p>
<p>Financial Management <i>www.walkerllp.com</i></p> <p>Purpose: to ensure that directors of national service programs develop the skills needed to effectively administer and manage federal funds. Training emphasis is on financial oversight requirements for state and national grantees and sub-grantees.</p>	<p>Walker and Company Corland Forester 5100 Wisconsin Ave., NW Suite 407 Washington, DC 20016 Toll free: (877) 363-9300 <i>ceforrester@walkerllp.com</i></p>	<p>Gina Fulbright-Powell (202) 606-5000 x 182 <i>gfulbrig@cns.gov</i></p>

PROVIDER ORGANIZATION	PROVIDER CONTACT	T/TA MANAGER Leadership
<p>Human Relations and Diversity Training</p> <p><i>www.chpinternational.com/DIVERSE.html</i></p> <p>Purpose: to build and enhance the skills of national service grantees and sub-grantees in working with and managing diverse teams and populations. Training provides strategies for dealing with situations in which issues of diversity and communication can interfere with effective program operations.</p>	<p>Diversity/CHP International</p> <p>Jim Hickman or Gin Lin Woo</p> <p>1040 North Boulevard Suite 220 Oak Park, IL 60301 Toll free: (800) 449-2614</p> <p><i>chphickman@aol.com</i> <i>chpwoo@aol.com</i></p>	<p>Jewel Bazilio-Bellegarde (202) 606-5000 x452 <i>jbazilio@cns.gov</i></p>
<p>Development</p> <p>Purpose: to provide leadership development and training for the staff of national service programs. The National Service Executive Program (NSE) is a five and a half day-training with a three-day follow-up six months later, designed for program/project directors to acquire an understanding of personal leadership abilities, leadership skills to increase program effectiveness, building collaborative teams, and exploring and forming partnerships with others in national service. The National Service Leadership Development Program (NSLDP) is a three-day training on the same topics and appropriate for all staff of national service programs. Leadership training assistance is also available for curriculum development and training delivery as resources permit.</p>	<p>National Service Leadership Institute (NSLI)</p> <p>Michael Mercil 2201 Broadway, Suite 510 Oakland, CA 94612-3024 Tel. (510) 273-0163</p> <p><i>mmercil@cns.gov</i></p>	<p>Michael Mercil Tel. (510) 273-0163 <i>mmercil@cns.gov</i></p>

PROVIDER ORGANIZATION	PROVIDER CONTACT	T/TA MANAGER
<p>Learn and Serve America National Service-learning Clearinghouse</p> <p><i>www.servicelearning.org</i></p> <p>Purpose: to provide Learn and Serve America grantees, other Corporation programs, and the service-learning field with extensive and well-organized information and materials about service-learning resources, programs and effective practices, as well as referrals to training and technical assistance providers.</p>	<p>ETR Associates</p> <p>Nancy Liebbe P.O. Box 1830 Santa Cruz, CA 95061 Tel. (831) 438-4060</p> <p>Toll free: (866) 245-7378</p> <p><i>nancyl@etr.org</i></p>	<p>Brad Lewis</p> <p>Tel. (202) 606-5000 x113</p> <p><i>blewis@cns.gov</i></p>
<p>Learn and Serve America Training and Technical Assistance Exchange</p> <p><i>www.lsaexchange.org</i></p> <p>Purpose: to strengthen the effectiveness of service-learning programs within four primary audiences: Learn and Serve-America grantees and sub-grantees; K-12 teachers and administrators; community-based organizations, and colleges and universities. Service is provided through regional networks of volunteer peer mentors doing site visits and online and telephone consultations.</p>	<p>National Youth Leadership Council</p> <p>Carole Klopp 1910 West County Road B St. Paul, Minnesota 55113</p> <p>Toll free: (877) LSA-EXCH</p> <p><i>lsaexchange@nylc.org</i></p>	<p>Amy Cohen</p> <p>Tel. (202) 606-5000 x484</p> <p><i>acohen@cns.gov</i></p>

PROVIDER ORGANIZATION	PROVIDER CONTACT	T/TA MANAGER
<p>Member Development and Management</p> <p><i>www.cnvs.org</i></p> <p>Purpose: to target the special needs of AmeriCorps programs, especially Education Award Only Programs. Services focus on recruitment, selection, motivation and retention of members and volunteers; member and volunteer development; team-building; working with and developing community partners; multi-site program management; service-learning methodology including member and volunteer orientation and reflection sessions; problem identification and solution; time management and day-to-day organizational skills.</p>	<p>Catholic Network of Volunteer Service</p> <p>Karen Stran 1410 Q St., NW Washington, DC 20009 Tel. (202) 332-6000, ext 15 <i>kstran@cnvs.org</i></p>	<p>Tom Lenhard Tel. (202) 606-5000 x205 <i>tlenhard@cns.gov</i></p>
<p>National Service Resource Center</p> <p><i>www.etr.org/NSRC</i></p> <p>Purpose: to provide technical assistance information related to all aspects of the planning and operation of community-based national service programs. Resource Center services include a lending resource library, distribution of publications including Next Steps, and a web site that includes the national technical assistance providers' list, the national training calendar and downloadable documents produced by the Corporation and its technical assistance providers.</p>	<p>ETR Associates</p> <p>Susan Hillyard P.O. Box 1830 Santa Cruz, CA 95061</p> <p>For Fed Ex: 4 Carbonero Way Scotts Valley, CA 95066</p> <p>Tel. (831)438-4060 Toll free: (800)860-2684 <i>susanh@etr.org</i></p>	<p>David Bellama Tel. (202) 606-5000 x483 <i>dbellama@cns.gov</i></p>

PROVIDER ORGANIZATION	PROVIDER CONTACT	T/TA MANAGER
<p>Organizational Development and Program Management</p> <p><i>www.chpinternational.com</i></p> <p>Purpose: to develop and strengthen program performance and quality through training in staff management; member recruitment and management; member support, development and retention; community partnerships and organizational collaboration; multi-site management; effective communication and public awareness.</p>	<p>Program Management/CHP International</p> <p>Drew Carberry 1034 1/2 Lake St., Suite 204 Oak Park, IL 60301</p> <p>Tel. (708) 386-9878 Toll free: (877) 959-1967</p> <p><i>dcarberry@chpinternational.com</i></p>	<p>Gina Fulbright-Powell Tel. (202) 606-5000 x182</p> <p><i>gfulbrig@cns.gov</i></p>
<p>Sustainability</p> <p><i>www.sustainabilityonline.com</i></p> <p>Purpose: to provide training to national service grantees that enhances their ability to develop the resources and partnerships needed to sustain and/or expand their programs and services beyond federal support.</p>	<p>Campaign Consultation</p> <p>Susan Hailman 2817 St. Paul Street Baltimore MD 21218</p> <p>Tel.(410)243-7979, ext.16 Toll free: (877) 243-ABLE</p> <p><i>hailman@campaignconsultation.com</i></p>	<p>David Bellama Tel. (202) 606-5000 x483</p> <p><i>dbellama@cns.gov</i></p>
<p>T/TA Services for State Commissions</p> <p><i>www.projecttasc.org</i></p> <p>Purpose: to enhance the effectiveness of state commissions in the management and administration of AmeriCorps sub-grantees. Customized training and technical assistance is provided to meet the needs of each commission.</p>	<p>Project TASC/Aguirre International</p> <p>Justine Murray 480 East 4th Ave, Unit A San Mateo, CA 94401</p> <p>Toll free: (888) 333-8272</p> <p><i>Jmurray@aiweb.com</i></p>	<p>Susan Schechter (202) 606-5000 x461</p> <p><i>sschecht@cns.gov</i></p>
<p>T/TA Services for State Commissions-Peer Assistance</p> <p><i>www.aassc.org</i></p> <p>Purpose: to enhance the effectiveness of state commissions in the management and administration of AmeriCorps sub-grantees. Services provided exclusively by peer experts.</p>	<p>American Association of State Service Commissions (AASSC)</p> <p>Jeanne Sanders 1400 Eye Street, NW Washington, DC 20005</p> <p>Tel. (202) 729-8263</p> <p><i>jsanders@asc-online.org</i></p>	<p>Susan Schechter (202) 606-5000 x461</p> <p><i>sschecht@cns.gov</i></p>

PROVIDER ORGANIZATION	PROVIDER CONTACT	T/TA MANAGER
<p>T/TA for Tribes</p> <p>Purpose: to provide specialized T/TA to strengthen programs that use service as a strategy to meet the needs of Native Americans. Service is provided through regional networks of peer mentors, online and phone consultations, as well as intensive training events designed to enhance the effectiveness of Native American programs.</p>	<p>ACKCO</p> <p>Susan White 2214 N. Central Ave., Suite 250 Phoenix, AZ 85004</p> <p>Tel. (602) 253-9211 Toll Free: (800) 525-2859</p> <p><i>susan.white@acko.com</i></p>	<p>David Miller (202) 606-5000 x491</p> <p><i>dmiller@cns.gov</i></p>
<p>WBRS Support</p> <p>Purpose: to support commissions and programs in the implementation and use of the Web-Based Reporting System.</p>	<p>WBRS/Aguirre International</p> <p>Jo Ann Intili 480 East 4th Ave, Unit A San Mateo, CA 94401</p> <p>Toll Free: (877) 367-9277</p> <p><i>jintili@aiweb.com</i></p>	<p>Wade Gatling (202) 606-5000 x451</p> <p><i>wgatling@cns.gov</i></p>

Supervising Members

What are my responsibilities for supervising members?

You must ensure that members perform service activities according to their contracts, that you enforce the rules on prohibited activities, fund raising and other program requirements.

What are member contracts?

(RELATED AMERICORPS PROVISION 7.B, APF PROVISION 7.B, AEAP PROVISION 7.B)

The member contract is the document that will explain to a member his or her responsibilities and rights as an AmeriCorps member in a specific program. To provide clarity and prevent subsequent member issues, program directors should walk through the contract during orientation and have members sign their contract. A copy of each member's signed contract must be kept in the member's file and recorded on the Member Information Profile in WBRS.

Refer to the sample contract on the next page to create a contract tailored to meet the specifications of your individual program.

Sample Member Contract for Participation in AmeriCorps

(This is provided only as guidance. You must customize this for your program, including dates, service requirements, position descriptions, and discipline codes. Also check your state law)

I. PURPOSE

It is the purpose of this agreement to delineate the terms, conditions, and rules of membership regarding the participation of _____ (hereinafter referred to as the “member”) in the _____ AmeriCorps Program (hereinafter referred to as the “Program”).

II. MINIMUM QUALIFICATIONS

The member certifies that he/she is a United States citizen, a United States national, or a lawful permanent resident alien and at least 17 years of age (or at least 16 years of age if the member is an out-of-school youth and a participant in one of two types of youth corps defined under the National and Community Service Act of 1990, as amended).

III. TERMS OF SERVICE

- A. The member’s term of service begins on _____ and ends on _____. The program and the member may agree, in writing, to extend this term of service for the following reasons:
1. The member’s service has been suspended due to compelling personal circumstances.
 2. The member’s service has been terminated, but a grievance procedure has resulted in reinstatement.
- B. The member will complete a minimum of 1700* hours (900 hours for part-/half-time) of service during this period. [*Or the exact number of hours your program requires — must be at least 1700 for full-time]

- C. The member understands that to successfully complete the term of service (as defined by the program and consistent with regulations of the Corporation for National Service) and to be eligible for the education award, he/she must complete at least 1700 (900) hours of service and satisfactorily complete pre-service training and the appropriate education/training that relates to the member's ability to perform service [You should customize this section to note any specific training requirements or other service requirements of your program. E.g., CPR, first aid, mediation and conflict resolutions skills and service-learning activities].
- D. The member understands that to be eligible to serve a second term of service the member must receive satisfactory performance reviews for any previous term of service. The member's eligibility for a second term of service with this program will be based on at least a mid-term and end-of-term evaluation of the member's performance focusing on factors such as whether the member has:
 - 1. Completed the required number of hours;
 - 2. Satisfactorily completed assignments, tasks, or projects; and
 - 3. Met any other criteria that were clearly communicated both orally and in writing at the beginning of the term of service.
- E. The member understands, however, that the mere eligibility for an additional term of service does not guarantee selection or placement.

IV. POSITION DESCRIPTION

[In this section, the program should include the position description for the individual member to whom the contract applies. The position description should specify the types of duties, service activities, and assignments the member will be expected to complete.]

The name of the member's direct supervisor is _____.

V. BENEFITS

- A. The member will receive from the program the following benefits:
 - 1. A living allowance in the amount of \$_____.
 - a. The living allowance is taxable, and taxes will be deducted directly from the living allowance.
 - b. The living allowance will be distributed [weekly/biweekly] by [direct deposit] [check] starting on [date]_____. The biweekly amount will be _____.
 - 2. [Health benefits (if the member is eligible). The health insurance policy is attached.]

3. If applicable, a child care allowance will be provided by the National Association of Child Care Resources and Referral Agencies (NACCRRA) directly to the provider, if the member qualifies for the allowance. (NACCRRA will distribute this allowance evenly over the term of service on a bi-weekly).
- B. Upon successful completion of the member's term of service, the member will receive an education award from the National Service Trust. For successful completion of a full-time term, the member will receive an education award in the amount of \$4,725. For successful completion of a part-time term, the member will receive an education award of [up to \$2362.50.] See different values on page 116.
1. If the member has not yet received a high school diploma or its equivalent (including an alternative diploma or certificate for individuals with learning disabilities), the member agrees to obtain a high school diploma or its equivalent before using the education award. This requirement can be waived if the member is enrolled in an institution of higher education on an ability to benefit basis or the program has waived this requirement due to the results of the member's education assessment.
 2. The member understands that his or her failure to disclose to the program any history of having been released for cause from another AmeriCorps program will render him or her ineligible to receive the education award.
- C. If the member has received forbearance on a qualified student loan during the term of service, the National Service Trust will repay a portion or all of the interest that accrued on the loan during the term of service.

VI. RULES OF CONDUCT

- A. At no time may the member:
1. Engage in any activity that is illegal under local, state or federal law.
 2. Engage in activities that pose a significant safety risk to others.
 3. Engage in any AmeriCorps prohibited activities that include:
 - any activity involving attempting to influence legislation or an election or aid a partisan political organization;
 - helping or hindering union activity;
 - engaging in religious instruction;
 - conducting worship services;
 - providing instruction as part of a program that includes mandatory religious instruction or worship;
 - constructing or operating facilities devoted to religious instruction or worship;

- maintaining facilities primarily or inherently devoted to religious instruction or worship;
 - engaging in any form of religious proselytization;
 - organizing or engaging in protests, petitions, boycotts, or strikes;
 - impairing existing contracts for services or collective bargaining agreements;
 - participating in, or endorsing, events or activities that are likely to include advocacy for or against political parties, political candidates, political platforms, proposed legislation, or elected officials;
 - providing a direct benefit to a for-profit entity, a labor union, a partisan political organization, a religious organization, or a non-profit that engages in lobbying.
- B. The member is expected to, at all times while acting in an official capacity as an AmeriCorps member:
- [NOTE: The following are given as examples only. You should customize this section to include all relevant requirements for your program.]*
1. Demonstrate mutual respect towards others.
 2. Follow directions.
 3. Direct concerns, problems, and suggestions to [designate the appropriate program official here].
- C. The member understands that the following acts also constitute a violation of the program's rules of conduct:
- [NOTE: The following are given as examples only. You should customize this section to include all relevant requirements for your program.]*
1. Unauthorized tardiness.
 2. Unauthorized absences.
 3. Repeated use of inappropriate language (i.e. profanity) at a service site.
 4. Failure to wear appropriate clothing to service assignments.
 5. Stealing or lying.
 6. **Engaging in any activity that may physically or emotionally damage other members of the program or people in the community.
 7. **Unlawful manufacture, distribution, dispensation, possession or use of any controlled substance or illegal drugs during the term of service.
 8. **Consuming alcoholic beverages during the performance of service activities.
 9. **Being under the influence of alcohol or any illegal drugs during the performance of service activities.

10. ****Failing to notify the program of any criminal arrest or conviction that occurs during the term of service.**

*[**Your program may want to have these violations result in immediate termination or something more severe than having them remedied through the progressive discipline system described below. If so, you will need to move them out this section and add them to the subsection VII(C)(4) below.]*

- D. Under the Drug-Free Workplace Act, you must immediately notify the Program Director if you are convicted under any criminal drug statute. Your participation in the Program is conditioned upon compliance with this notice requirement and we will take action for violation of this.
- E. In general, for violating the above stated rules in section VI(C), the program will do the following (except in cases where during the term of service the member has been charged with or convicted of a violent felony, possession, sale or distribution of a controlled substance):
1. For the member's first offense, an appropriate program official will issue a verbal warning to the member.
 2. For the member's second offense, an appropriate program official will issue a written warning and reprimand the member.
 3. For the member's third offense, the member may be suspended for one day or more without compensation and will not receive credit for any service hours missed.
 4. For the fourth offense, the program may release the member for cause.
- F. The member understands that he/she will be either suspended or released for cause in accordance with paragraphs (B), (C), and (F) of section VII of this agreement for committing certain acts during the term of service including but not limited to being convicted or charged with a violent felony, possession, sale, or distribution of a controlled substance.

VII. RELEASE FROM TERMS OF SERVICE

- A. The member may be released by the Program from the term of service in the following two ways:
1. Suspension, as described in paragraphs (F) of this section; or
 2. Termination.
- B. The member understands that he/she may be released for the following two reasons:
1. For cause, as explained in paragraph (C) of this section; or
 2. For compelling personal circumstances as defined in paragraph (F) of this section.

- C. The program will release the member for cause for the following reasons:
1. The member has dropped out of the program without obtaining a release for compelling personal circumstances from the appropriate program official;
 2. During the term of service the member has been convicted of a violent felony or the sale or distribution of a controlled substance;
 3. The member has committed a fourth offense in accordance with paragraph (E) of section VI of this agreement;
 4. The member has committed any of the offenses listed in [Your program may want to add the **violations in section VI(C) 6-10 here or any others you deem appropriate]; or
 5. Any other serious breach that in the judgment of the director of the Program would undermine the effectiveness of the program.
- D. The Program may release the member from the term of service for compelling personal circumstances if the member demonstrates that:
1. The member has a disability or serious illness that makes completing the term impossible;
 2. There is a serious injury, illness, or death of a family member which makes completing the term unreasonably difficult or impossible for the member;
 3. The member has Military service obligations;
 4. The member has accepted an opportunity to make the transition from welfare to work; or
 5. Some other unforeseeable circumstance beyond the member's control makes it impossible or unreasonably difficult for the member to complete the term of service, such as a natural disaster, a strike, relocation of a spouse, or the nonrenewal or premature closing of a project or the program.
- E. Compelling personal circumstances do not include leaving the Program:
1. To enroll in school;
 2. To obtain employment, other than in moving from welfare to work; or
 3. Because of dissatisfaction with the program.

- F. The Program may suspend the member's term of service for the following reasons:
1. During the term the Member requests a suspension based on compelling personal circumstances, as described in paragraph (D) of this section. During the suspension from service, the member will not receive credit for service hours or benefits (as described in Section V). The member may resume his or her term of service once the circumstances supporting the suspension have been resolved. However, a suspension may last no more than two years from the date of suspension. If the member does not resume the term within the two year period, the member may request that the program exit the member and the member will be eligible for a partial education award based on the number of hours served in the term.
 2. During the term of service the member has been 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.)
 3. During the term of service the member has been convicted of a first offense of possession of a controlled substance. (If, however, the member demonstrates enrollment in an approved drug rehabilitation program, the member may resume the term of service. The member will not receive back living allowances or credit for any service hours missed.)
- G. The Program may suspend the member's term of service for violating the rule of conduct provisions set forth in paragraph (C) of section VI of this agreement.
- H. If the program releases the member for cause or for compelling personal circumstance, the member will cease to receive the benefits described in paragraphs (A) and (C) of section V.
- I. If the program releases the member for cause the member will receive no portion of the education award. If, however, the program releases the member for compelling personal circumstances, the member will receive a prorated education award, provided the member has completed at least 15 percent of the hours needed to complete the term of service.
- J. A term that ends early, either for cause, or for compelling personal circumstances, is still considered a term and the education award that the member receives, or would have been eligible to receive, will count towards the total of two education awards an individual may receive through service with AmeriCorps.

VIII. GRIEVANCE PROCEDURES

- A. The member understands that the Program has a grievance procedure to resolve disputes concerning the member’s suspension, dismissal, service evaluation or proposed service assignment.
- B. The member understands that, as a participant of the program, he/she may file a grievance in accordance with the Program’s grievance procedure. [Incorporate your grievance procedure into the body of this section].

IX. AMENDMENTS TO THIS AGREEMENT

This agreement may be changed or revised only by written consent by both parties.

X. AUTHORIZATION

The member and Program hereby acknowledge by their signatures that they have read, understand, and agree to all terms and conditions of this agreement. (If the member is under the age of 18 years old, the member’s parent or legal guardian must also sign.)

AmeriCorps Member

AmeriCorps Program Director

Signature

Signature

Name

Name

Date

Parent/Legal Guardian

Is the grievance procedure part of the member contract?

(RELATED AMERICORPS PROVISION 32, APF PROVISION 31, AEAP PROVISION 31)

Yes. You must explain to your members the grievance procedures of your program and have a signed copy acknowledging the member's understanding of these procedures.

Overview

If informal efforts to resolve disputes are unsuccessful, AmeriCorps members, labor unions, and other interested individuals may seek resolution through a grievance procedure. AmeriCorps grievance procedures may include an optional component-alternative dispute resolution. The procedures must include a hearing and binding arbitration.

The grievance procedure is not designed to address all issues. Allegations of fraud and criminal activity must be reported immediately to the Corporation's Inspector General. Allegations of discrimination should be directed in writing to the Corporation's Office of Equal Opportunity. However, it is designed to address most disputes between members and their programs, as well as grievances from labor unions and other interested individuals.

Grievance procedure requirements are published in the Corporation's statute (42 U.S.C. § 12636) and regulations (45 C.F.R. § 2540.230). They are summarized as follows:

Required grievance procedures

By law, a program must provide a grievance procedure to resolve disputes filed by AmeriCorps members, labor unions, and other interested persons (including AmeriCorps member applicants). The grievance procedure must include a hearing and binding arbitration.

Grievance hearing: By law, programs must provide an opportunity for a grievance hearing, provided that a request is made within one year of the matter at issue. Hearings must be held no later than 30 calendar days after the filing of the grievance, and a decision must be made no later than 60 calendar days after the filing of the grievance. Hearings must be conducted by a person who has not participated in any previous decisions concerning the issue in dispute.

Binding arbitration: By law, programs must provide an opportunity for binding arbitration in the event a grievance hearing decision is adverse to the aggrieved party or if no decision is made within 60 days of the filing of the grievance. The arbitrator must be independent and selected by agreement of the parties. If the parties cannot agree on an arbitrator, the Corporation's Chief Executive Officer will appoint one within 15 calendar days after receiving a request from one of the parties.

An arbitration proceeding must be held no later than 45 calendar days after the request for arbitration, or no later than 30 calendar days after the appointment of an arbitrator by the Corporation's CEO. An arbitration decision must be made no later than 30 calendar days after the commencement of the arbitration proceeding.

The cost of arbitration must be divided evenly between the parties, unless the aggrieved party prevails, in which case the program must pay the total cost of the proceeding as well as the prevailing party's attorneys' fees. A law suit to enforce an arbitration award may be brought in any federal district court having jurisdiction over the parties.

An example grievance procedure is included on page 88. The following exhibit illustrates the timeframes that must be addressed in an AmeriCorps grievance procedure. Not every requirement is shown, but all major milestones are noted.

Timeline for Grievance Procedures

- ★ **within 1 year of alleged occurrence → GRIEVANCE FILED**
- ★ **within 30 days of filing of grievance → HEARING**
- ★ **within 60 days of filing of grievance → DECISION**
- ★ **if decision is adverse to grievant, or 60 days after filing grievance if no decision has been reached → REQUEST FOR BINDING ARBITRATION**
- ★ **within 45 days after request for arbitration, or within 30 days after CEO appoints arbitrator → BINDING ARBITRATION HEARING**
- ★ **within 30 days of arbitration hearing → BINDING ARBITRATION DECISION**

MODEL GRIEVANCE PROCEDURE

For AmeriCorps*State/National Programs

This model is provided to programs as a guide only, and combines provisions that are required by law with optional elements.

In the event that informal efforts to resolve disputes are unsuccessful, AmeriCorps members, labor unions, and other interested individuals may seek resolution through the following grievance procedures. These procedures are intended to apply to service-related issues, such as assignments, evaluations, suspensions, or release for cause, as well as issues related to non-selection of members, and displacement of employees, or duplication of activities by AmeriCorps.

A. OPTIONAL ALTERNATIVE DISPUTE RESOLUTION (ADR)

[The program may choose to include ADR in its grievance as a first option for an aggrieved party. ADR includes mediation or conciliation. This section assumes that the program has chosen to make ADR available.]

ADR is available, but must be selected within 45 days of the underlying dispute. If an aggrieved party chooses ADR as a first option, a neutral party designated by the program will attempt to facilitate a mutually agreeable resolution. The neutral party must not have participated in any previous decisions concerning the issue in dispute. ADR is confidential, non-binding, and informal. No communications or proceedings of ADR may be referred to at the grievance hearing or arbitration stages. The neutral party may not participate in subsequent proceedings.

If ADR is chosen by the aggrieved party, the deadlines for convening a hearing and of a hearing decision, 30 and 60 days respectively, are held in abeyance until the conclusion of ADR. At the initial session of ADR, the neutral party must provide written notice to the aggrieved party of his or her right to request a hearing. If ADR does not resolve the matter within 30 calendar days, the neutral party must again notify the aggrieved party of his or her right to request a hearing. At any time, the aggrieved party may decline ADR and proceed directly to the hearing process.

B. GRIEVANCE HEARING

An aggrieved party may request a grievance hearing without participating in ADR or, if ADR is selected, if it fails to result in a mutually agreeable resolution. The aggrieved party should make a written request for a hearing to [the designated program supervisor or director]. A request for a hearing must be made within one year after the date of the alleged occurrence. At the time a request for a hearing is made, the program should make available to the aggrieved party information that it relied upon in its disciplinary decision.

The program will arrange for one or more pre-hearing conferences at a time mutually convenient to the parties. Pre-hearing conferences are not a substitute for a hearing. They are intended to facilitate a mutually agreeable resolution of the matter to make a hearing unnecessary or to narrow the issues to be decided at the hearing. The format of the pre-hearing conference may be flexible, involving meetings with one party at a time and/or with both parties together. Pre-hearing conferences are conducted by [program supervisor/director A]. The hearing will be conducted by [program supervisor/director B]. The person conducting the hearing may not have participated in any previous decisions concerning the issue in dispute. (Note: To ensure impartiality in the hearing, programs may choose to designate someone other than the program director to approve disciplinary actions regarding members, leaving the director available to conduct grievance hearings.) A hearing must be held no later than 30 calendar days after the filing of the grievance, and a written decision must be made no later than 60 calendar days after filing.

C. BINDING ARBITRATION

An aggrieved party may request binding arbitration if a grievance hearing decision is adverse or if no decision is made within 60 days of the filing of the grievance. The arbitrator must be independent and selected by agreement of the parties. If the parties cannot agree on an arbitrator, the Corporation's Chief Executive Officer will appoint one within 15 calendar days after receiving a request from one of the parties.

An arbitration proceeding will be held no later than 45 calendar days after the request for arbitration, or no later than 30 calendar days after the appointment of an arbitrator by the Corporation's CEO. An arbitration decision will be made no later than 30 calendar days after the commencement of the arbitration proceeding.

The cost of arbitration will be divided evenly between the parties, unless the aggrieved party prevails, in which case the program will pay the total cost of the proceeding as well as the prevailing party's attorneys' fees.

What member activities are prohibited?

(RELATED AMERICORPS PROVISION 4, APF PROVISION 4, AEAP PROVISION 4)

There are certain activities—including lobbying, political, religious, or advocacy activities—that AmeriCorps members and staff may not perform in the course of their duties, while charging time to the AmeriCorps program, or at the request of program staff. Furthermore, members and staff may not engage in any conduct in a manner that would associate the national service program or the Corporation with the prohibited activities. Programs must become familiar with the specific prohibitions described in the Corporation’s formal regulations (45 C.F.R. §2520.30) and the grant provisions.

What are the guidelines for fundraising?

(RELATED AMERICORPS PROVISION 5, APF PROVISION 5, AEAP PROVISION 5)

In general, AmeriCorps members cannot assist their organizations with major fundraising efforts. However, Corporation policy permits some limited activities related to fundraising by AmeriCorps members to the extent that such activities:

- ★ provide immediate and direct support to a specific and direct service activity;
- ★ fall within the program’s approved direct service objectives;
- ★ are not the primary activity of the program; and
- ★ do not involve significant amounts of time for any member.

For example, members may:

- ★ solicit supplies from local businesses for a direct service project—e.g., solicit several cans of paint from a store near a work site to meet a need.
- ★ organize an occasional “serv-a-thon” in which members recruit individuals to obtain sponsors in advance of an approved direct service event.

Members may not:

- ★ prepare any part of a grant proposal or perform other fundraising functions to help you achieve your match requirement, or to pay your organization’s general operating expenses.

What should I do with the Member Confidentiality/ Informed Consent Form?

(RELATED AMERICORPS PROVISION 14, APF PROVISION 14.C, AEAP PROVISION 14.C)

You should note receipt of a member’s Confidentiality/Informed Consent Form in the member checklist on the Member Information Profile in WBRS.

Individual states have laws regarding member confidentiality. Please familiarize yourself with them.

What is the Drug Free Workplace Act?

(RELATED AMERICORPS PROVISION 29, APF PROVISION 28, AEAP PROVISION 28)

The Drug Free Workplace Act outlined in your grant provisions and the Corporation regulations as set forth in 45 C.F.R. requires you to give notice about the Act to your employees and members and to conduct a drug free awareness program. Your compliance with this provision should be documented in your program operation files and on each Member Information Profile in WBRS.

What is the guidance on member safety?

(RELATED AMERICORPS PROVISION 28, APF PROVISION 27, AEAP PROVISION 27.B)

Safety precautions to protect members. Under the provisions, programs must have appropriate safeguards in place to ensure the safety of members. Further, members may not participate in projects or undertake service activities that pose a significant safety risks.

Specific safety procedures. The Corporation does not have a specific safety procedure that programs must follow. Programs should establish appropriate policies related to the supervision of members and provide specific training (such as the proper use of power tools) to minimize risks to members. In addition, programs should avoid placing members in situations where they will witness crimes, get involved in the arrest process, or handle legal evidence.

Member death/serious injury

(RELATED AMERICORPS PROVISION 7.K, APF PROVISION 7.J, AEAP PROVISION 7.I)

If a member dies or is seriously injured while in service, the program director or designee should immediately notify the relevant program officer at the Corporation. The program director should give the program officer as much information as possible including the member's name, home address and phone number, next of kin, and the circumstances of the death or injury.

What about voting?

(RELATED AMERICORPS PROVISION 4.I,7.I, APF PROVISION 4.I, 7.H, AEAP PROVISION 4.I, 7.H)

Programs should encourage eligible members who are unable to vote before or after service hours to do so during their service time without incurring any penalties. The site director should determine the acceptable length of absence. For example, many federal, state, and private sector employers allow their employees to take leave with pay for up to three hours after the polls open or three hours before they close, whichever results in less time off from work, to enable them to vote in person.

How do I release a member?

(RELATED AMERICORPS PROVISION 9, APF PROVISION 9, AEAP PROVISION 9)

Programs may release members for:

- ★ compelling personal circumstances; or
- ★ cause.

Releasing a member for a compelling personal circumstance. If a member wants to leave the program, the member has the primary responsibility for demonstrating that compelling personal circumstances prevent him or her from completing the term of service. You have the authority to determine whether or not the member's reason for leaving is a "compelling personal circumstance."

Programs must document the basis for any determination that compelling personal circumstances prevent the member from completing the term of service. (Program directors should carefully review the detailed procedures specified in the Corporation's regulations (45 C.F.R. § 2522.230) and the AmeriCorps grant provisions.)

Consequences of releasing a member for compelling personal circumstances:

- ★ A participant who is released for compelling personal circumstances and who has completed at least 15 percent of the required term of service is eligible for a pro-rated education award.
- ★ As an alternative to releasing a participant, the program may, after determining that compelling personal circumstances exist, suspend the participant's term of service for up to two years (or longer if approved by the Corporation based on extenuating circumstances) to allow the participant to complete service with the same or a similar AmeriCorps program at a later time.

Releasing a member for cause. *A release for cause encompasses any circumstances other than compelling personal circumstances that warrant an individual's release from completing a term of service.* These could include anything from disciplinary removals pursuant to the program's contract with the member, to the member's decision to leave for any reason that is not a compelling personal circumstance. The term "for cause" does not necessarily have the same meaning as under traditional employment law. Any reason for leaving other than compelling personal circumstances is for cause under the National and Community Service Act of 1990 as amended. Please review the Corporation's regulations (45 C.F.R. § 2522.230) for a more detailed discussion on releasing a member for cause. AmeriCorps programs must release for cause any participant who is convicted of a felony or the sale or distribution of a controlled substance during a term of service.

What are the consequences of releasing a member for cause?

- ★ The member will not receive any portion of the education award or any other payment from the National Service Trust, including loan forbearance.
- ★ An individual who is released for cause must disclose this fact in any subsequent applications to participate in an AmeriCorps program. Failure to do so disqualifies the individual for an education award, regardless of whether the individual completes a term of service.

You must immediately notify your granting agency, the National Service Trust, health care provider, and, if the member is receiving child care, the National Association of Child Care Resource and Referral Agencies (NACCRRRA) if you release a member either for compelling personal circumstances or for cause.

In every case where a member leaves a program, you must submit exit information to the Trust using WBRS. WBRS will automatically prompt users to provide justification for early release. The director's reasons for the determination should be as specific and detailed as possible, and should be consistent with the regulations and grant provisions as noted.

A member charged with a crime during a term of service:

If a member is charged officially with a violent felony (such as a rape or homicide) or the sale or distribution of a controlled substance, you must suspend him or her without a living allowance and without receiving credit for missed hours. This is a minimum requirement. He or she may resume service if found not guilty or if the charge is dropped. If convicted, he or she must be released for cause.

A member convicted for possession of a controlled substance:

If a member is convicted for possession of a controlled substance, you must suspend him or her without a living allowance and without receiving credit for hours missed. If convicted of a first offense, the member may resume service by enrolling in an approved drug rehabilitation program. If convicted of a second or third offense, the member may resume service only upon successfully completing a rehabilitation program.

How do I suspend a member?

(AMERICORPS PROVISION 9, APF PROVISION 9, AEAP PROVISION 9)

You may grant permission for a member to leave your program for a "compelling personal circumstance," and suspend his or her term of service for a period of up to two years. When the member leaves the program, you must notify your state commission, parent organization, or Corporation Trust Office (for Tribes and Territories) within 30 days of the suspension. If the member was enrolled via WBRS, you should make the change in WBRS.

May a member return to the program after suspension?

After the suspension period, the member may return to the program in which he or she was serving or to a similar AmeriCorps program. When applying to another program after an extended absence, the member provides the director of that program with a copy of the Change of Status/Term Form indicating previous service in another program. If the member is accepted, a new Change of Status/Term Form is submitted using WBRS to the appropriate contact agency listed on page 24 by the new program, which reinstates the member and transfers the hours.

How do I replace a member?

A program that loses AmeriCorps members between classes has the option of filling the vacated slots with the approval of the contact agency listed on page 24. However, the Corporation specifically discourages rolling admissions and programs are encouraged to fill empty slots at the start of the next term of service. One reason empty AmeriCorps slots should be filled in January, June, or September classes is that programs must provide the same comprehensive training and orientation to replacement AmeriCorps members as was provided to members of the first class. It is considerably less burdensome and more cost-effective for programs to bring on and train replacement members at the same time.

How do I transfer a member to another program?

With the following restrictions a commission, parent organization, or Corporation Program Officer may grant permission to transfer a member to another AmeriCorps*State or AmeriCorps*National program. Note that members may not transfer across different streams of service. For example, a member may not transfer from an AmeriCorps*State or *National program to a AmeriCorps*VISTA position or to AmeriCorps*NCCC. The WBRS On-Line Help Manual contains instructions for transferring a member enrolled in WBRS.

- ★ Program A must first determine that compelling personal circumstances warrant a transfer. (See page 92 for more information on “Compelling Personal Circumstances”.)
- ★ Prior to initiating a transfer, Program A must obtain from its commission, parent organization or CNCS Program Officer (for Tribes and Territories) written confirmation that valid compelling circumstances support transfer and written approval to complete the transfer.
- ★ The member must apply to and be accepted to Program B, which must have an available slot in the incoming class (this means the program is able to provide a full term of member support costs and an education award).
- ★ No funds can be transferred from Program A to Program B.
- ★ The director of Program A must send hard copies of all time logs for the member to Program B.
- ★ Using WBRS, the director of Program A must complete a Change of Status Form.
- ★ The director of Program B must complete and approve a Member Enrollment, Member Information Profile, and time logs up to the current date. Follow the instructions in the WBRS On-Line Help Manual.
- ★ If Program A is not using WBRS, written notice of the transfer, along with a copy of the written approval from the Program’s commission, parent organization, or CNCS Program Officer must be sent to the Program’s representative at the National Service Trust. Notice must also include written approval from the directors of both Program A and Program B.

Talk with your contact agency listed on page 24 for more information.

Should a program not be renewed, members who were scheduled to continue their term of service should be placed in other programs if at all feasible, or they can receive a pro-rated education award if they have completed at least 15 percent of the necessary hours.

Managing the Program

What are my overall program management responsibilities?

You must use WBRS as your main tool for tracking members' status, hours, service activities and accomplishments as well as for financial records.

What are the uses of the web-based reporting system (WBRS) *http://wbrs.net*?

In 2001-2002, AmeriCorps*State and National programs are using the Web-Based Reporting System (WBRS) to make use of the Internet to:

- ★ electronically enroll members, change their status, and exit them from programs;
- ★ submit progress reports to state commissions or national direct parent organizations, and ultimately to the Corporation; and
- ★ compile and submit Financial Status Reports to state commissions or parent organizations, and ultimately to the Corporation.

Programs will no longer use paper forms to meet these reporting requirements to the Corporation. However, programs should maintain the hard copy of all forms with a required signature of member or certifying official (e.g. enrollment and timesheets).

This handbook is not intended to duplicate the supporting documentation and instructions for WBRS. Specific instructions for using WBRS to carry out your reporting responsibilities appear in the WBRS On-line Manual.

WBRS Access Roles Tables

User Role Abbreviations

AmeriCorps*State	National Directs, Tribes & Territories, NCCC, EAP
ED – Executive Director	P/TOD – Parent/Tribal Organization Director
EA – Executive Administrator	P/TOA – Parent/Tribal Organization Administrator
PD – Program Director	SD – Site Director
SA – Site Administrator	SA – Site Administrator
FD – Financial Director	FD – Financial Director
AA – Accounting Administrator	AA – Accounting Administrator

Which Roles are Where

AmeriCorps*State		National Directs, Tribes & Territories, NCCC, EAP	
Commission	Program	Parent	Site
ED	PD	P/TOD	SD
EA	SA	P/TOA	SA
	FD		FD
	AA		AA

*User Access Rights AmeriCorps*State*

State Commission-Level Forms and Functions		ED	EA	PD	SA	FD	AA
<i>GIP</i>	Read	X	X	X	X	X	X
	Modify	X	X				
	Approve	X					
<i>Budgets</i>	Read	X	X	X	X	X	X
	Modify	X	X	X	X	X	X
	Approve	X					
<i>Aggregate Reports</i>	Read	X	X				
	Create / Modify / Delete	X	X				
	Approve	X					
<i>User Profiles</i>	Read	X	X	X*	X*	X*	X*
	Create	X	X**				
	Edit (change password, phone no., e-mail address)	X	X**	X [§]	X [§]	X [§]	X [§]
	Delete	X	X**	X [§]	X [§]	X [§]	X [§]
Program-Level Forms		ED	EA	PD	SA	FD	AA
<i>All Member Forms</i>	Read	X	X	X	X	X	X
	Create / Modify / Delete	X ⁺		X	X		
	Approve			X			
<i>Progress Reports</i>	Read	X	X	X	X	X	X
	Create / Modify / Delete			X	X		
	Approve			X			
<i>PERs, FSRs, Income Reports</i>	Read	X	X	X	X	X	X
	Create / Modify / Delete			X	X	X	X
	Approve			X		X	

* User can only view the profiles of users at their own program.

** User can perform the indicated action (create, delete, edit) on all user profiles except those of EDs and other EAs.

§ User can perform the indicated action (delete, edit) only on their own user profile

+ ED's can change SSN and Start Date on an MIP if it's been saved as complete or approved.

User Access Rights National Directs, Tribes and Territories, EAP, NCCC

Parent Organization-Level Forms and Functions		P/TOD	P/TOA	SD	SA	FD	AA
<i>GIP</i>	Read	X	X	X	X	X	X
	Modify	X	X				
	Approve	X					
<i>Budgets</i>	Read	X	X	X	X	X	X
	Modify	X	X	X	X	X	X
	Approve	X					
<i>Aggregate Reports</i>	Read	X	X				
	Create / Modify / Delete	X	X				
	Approve	X					
<i>User Profiles</i>	Read	X	X	X*	X*	X*	X*
	Create	X	X**				
	Edit (change password, phone no., email address)	X	X**	X§	X§	X§	X§
	Delete	X	X**	X§	X§	X§	X§
Operating Site-Level Forms							
<i>All Member Forms</i>	Read	X	X	X	X	X	X
	Create / Modify / Delete	X	X	X	X		
	Approve	X		X			
<i>Progress Reports</i>	Read	X	X	X	X	X	X
	Create / Modify / Delete	X	X	X	X		
	Approve	X	X				
<i>PERs, FSRs, Income Reports</i>	Read	X	X	X	X	X	X
	Create / Modify / Delete	X	X	X	X	X	X
	Approve	X	X	X			

* User can only view the profiles of users at their own site.

** User can perform the indicated action (create, delete, edit) on all user profiles except those of P/TODs and other P/TOAs.

§ Users can perform the indicated action (delete, edit) only on their own user profile.

How do I request a slot conversion?

A slot conversion is necessary when a program wants to convert an unfilled full-time slot into part-time slots with the condition that the number of full-time equivalents (FTE) remains unchanged from the FTE specified in the program grant contract.

A program may request a slot conversion with the approval of the contact agency listed on page 24. If the total number of slots converted exceeds the threshold specified in the Provisions, the parent organization or commission will need to first request the approval of the Corporation Program Office to proceed with the conversion.

Refer to the WBRS on-line help manual, “Member Forms and Worksheets,” for step-by-step instructions on how to process a Slot Conversion Form.

How do I request a slot correction?

A Slot Correction Form is necessary when a program needs to increase or decrease the number of slots awarded in its grant. The FTE specified in the program grant contract will be altered by this request.

A slot correction form can only be processed by the program’s contact agency and it requires the approval of the Corporation Grants Office.

How do I change a term of service?

A Change of Term of Service Form is needed when:

- ★ A member is moving from one type of slot to another. For instance, a member may start out as part-time, then request to be moved to a full-time position.
- ★ An error in enrollment type was made on the Member Information Profile (MIP) when the enrollment form in WBRS was created.

Converting a member’s term to decrease service hours

(AMERICORPS PROVISION 8.E., AEAP PROVISION 8.D.)

Note: All AmeriCorps Promise Fellows must serve full-time. Therefore, Promise Fellows’ terms may not change from full-time to part-time.

If you are changing the member’s term to fewer service hours (e.g., one-year PT to 300-hr Summer), the following conditions must both apply to process the form:

1. The effective date of change of the term must be within 30 days of the member’s enrollment start date.
2. The date on which you’re making the change in WBRS must be within 30 days of the effective date of the change of term.

The program or operating site should first check with its commission or parent organization, respectively, to determine the approval process (refer to your contact agency under the communication structure listed on page 24). The steps below provide guidance to process a Change in Term of Service Form in WBRS. Step-by-step WBRS instructions can also be found under “Member Forms and Worksheets” in the WBRS on-line help manual.

If the program’s contact agency approves the request to change a member term or if approval by the contact agency is not required, the program director takes the following steps to process the *Change in Term of Service Form*:

1. A program must first determine if there is a **vacant or unfilled slot** of the type that the member will transfer into. If there are no vacant slots, the program will need to either request a slot conversion (when there is no change in FTE) or correction (when there is a change in FTE). Since this change involves a change in the grant agreement, the program should refer to its contract before initiating either request. Assuming a slot *conversion* is needed to create a vacant slot, the program needs to complete the *Slot Conversion Form*. If the conversion request exceeds the threshold defined in the Provisions, the state commission or parent organization cannot approve the request without the Corporation’s approval. The program should always provide a justification explaining the basis for the slot conversion request in the “comments” section on the bottom of the form that may be viewed by the Corporation. After the slot conversion has been approved in WBRS, a notification is sent to the National Service Trust so the member enrollment records are updated to indicate the new education award type.
2. Next, a *Change in Term of Service Form* must be completed in WBRS and approved, in accordance with your contact agency’s policies, within thirty days.
3. The program director should also review the budget to determine if a budget modification is necessary. This may be necessary as a result of the Change in Term of Service.

Converting a member’s term to increase service hours

(AMERICORPS PROVISION 8.C.II (B), AEAP PROVISION 8.D. II (B))

Unless initiated early in the program year, converting part-time members to full-time is discouraged because the member may find it difficult to complete the required full-time hours of service. State commissions and parent organizations may authorize and approve such changes so long as they are within the first thirty days of the member’s service, and the following conditions are met:

The current budget can accommodate such changes.

1. The member’s minimum 1,700 can be completed within 12 months of the member’s original start date. The member contract will need to be revised and signed by member.
2. A program must first determine if there is a **vacant or unfilled slot** of the type that the member is to transfer into. If there are no vacant slots, the program will need to either request a slot conversion (when there is no change in FTE) or correction (when there is a change in FTE). Since this change involves a change in the grant agreement, the program should refer to its contract before initiating either request. Assuming a slot *conversion* is needed to create a vacant

slot, the program needs to complete the *Slot Conversion Form*. If the conversion request exceeds the threshold defined in the Provisions, the state commission or parent organization cannot approve the request without the Corporation's approval. The program should always provide a justification explaining the basis for the slot conversion request in the "comments" section on the bottom of the form that may be viewed by the Corporation. After the slot conversion has been approved in WBRS, a notification is sent to the National Service Trust so the member enrollment records are updated to indicate the new education award type.

3. Next, a *Change in Term of Service Form* must be completed in WBRS and approved by your contact agency within thirty days.

How do I change a member's status?

A *Change of Status Form* needs to be completed by the program when it is taking the following actions:

- ★ Suspending a member,
- ★ Reinstating a member or
- ★ Transferring a member (see page 94)

Refer to the Provisions for policy guidance and the WBRS on-line manual for the step-by-step instructions in how to process this form.

How do I exit a member?

Use the sample checklist on the next page to organize the final actions that need to take place once your members complete their term of service.

Checklist for Exiting Members

END OF TERM/EXIT FORM

Have members complete and sign the National Service Trust End of Term Form. Keep the signed original in the member's file and submit the online version in WBRS. WBRS automatically submits the form to the National Service Trust.

EARLY TERMINATION

COMPELLING PERSONAL CIRCUMSTANCES

Following the guidelines on page 92, program directors determine whether or not any specific situation is acceptable to release a member for compelling personal circumstances. In this case, members who have completed 15 percent of their service are entitled to receive a pro-rated education award.

RELEASE FOR CAUSE

Following the guidelines in your member contract, members can be asked to leave the program for cause. In this case, a member is not eligible to receive a pro-rated education award. In both cases, the End of Term/Exit Form should be filled out and completed in WBRS.

EXIT INTERVIEW

Many programs find it valuable to conduct an exit interview or ask the members to fill out an evaluation on the program and their experience as AmeriCorps members.

INTEREST ACCRUAL FORM

The Corporation will pay all or a portion of the interest that has accrued during the member's term of service on an eligible student loan. To receive this payment, the member must send a completed Interest Accrual Form to the loanholder who will fill out the loanholder's section and return it to the Trust for payment.

Is my program going to be visited?

(AMERICORPS RELATED PROVISION 27, APF PROVISION 26, AEAP PROVISION 26)

AmeriCorps*State programs should expect site visits from the staff and possibly even members of your state commission. AmeriCorps*National project sites should expect site visits from the staff of your parent organization. Corporation staff will make every effort to conduct site visits to program/project sites. They will be coordinated with, and in most cases organized by, state commissions for AmeriCorps*State programs, parent organizations for AmeriCorps*National project sites, and program officers for AmeriCorps*Tribes and Territories and certain Education Awards Programs.

The purpose of site visits

Site visits allow staff to learn more about a program's service activities and community partnerships; to hear success stories of AmeriCorps programs; to ensure compliance with Corporation and state regulations, policies, and grant provisions; to monitor the progress of a program toward meeting its objectives; and perhaps most important, to provide technical assistance to improve the quality of programs.

What are my reporting requirements?

(AMERICORPS PROVISION 16, APF PROVISION 16, AEAP PROVISION 16)

Please see the Provisions for guidance.

What is the Office of the Inspector General?

The role of the Corporation's Office of Inspector General

The Corporation's Office of the Inspector General (OIG) is an independent and objective office established to help improve the Corporation's programs and operations (including AmeriCorps). The OIG has the responsibility of keeping the Corporation's Chief Executive Officer and the Congress informed about problems and deficiencies relating to the Corporation's programs and operations. The OIG carries out this role by conducting and supervising audits and investigations that promote economy and efficiency, and prevent and detect fraud, waste, and abuse, in the Corporation programs and operations. The OIG is authorized by statute to have full access to all records, reports, and other available material in conducting its work. The OIG also coordinates the Corporation's relationships on matters of fraud, waste and mismanagement with other organizations, including federal, state and local law enforcement agencies.

When to contact the Office of the Inspector General (AMERICORPS PROVISION 20.C)

You should promptly contact the Office of the Inspector General whenever someone in your program discovers information that indicates there might have been waste, fraud, or abuse, or any violation of criminal law at your program or program site. The OIG accepts confidential referrals of information.

Written notifications should be submitted to:

Office of the Inspector General
Corporation for National and Community Service
1201 New York Avenue, N.W.
Washington, D.C. 20525

The OIG can also be reached by calling (202) 606-5000, ext. 390, or its toll-free hotline, (800) 452-8210.

Managing Your Fiscal Responsibilities

What are my fiscal management responsibilities?

The grant award and its provisions contain many of the details and specifics governing the management of your grant. Your organization's financial officer and accountant should be familiar with the more detailed financial and management requirements contained in Corporation regulations, the grant and the applicable Office of Management and Budget (OMB) Circulars.

In order to effectively manage and implement your program, program directors need to be familiar with the principal requirements applicable to the AmeriCorps program, such as member recruitment, training, prohibitions on lobbying, terms of service, minimum hours, etc. In addition, you should be familiar with the special limitations on use of funds that apply to AmeriCorps, such as the 5 percent limitation on federal funds for administrative costs and the prohibition on using budgeted member allowances and benefit funds for other program activities and expenses. All of these requirements have been recently revised and are detailed in the AmeriCorps provisions in your grant.

The basics of a good financial management system

To build a good financial management system, programs must use standard accounting practices with general ledgers and similar books of record, supported by source documentation that establishes a clear audit trail. The financial reports must lead back to the ledgers and source documents clearly. Since you, as the program director, are responsible for the overall administration of the program, you should take an active role in understanding and monitoring the financial systems.

Programs must document the member hours through time and attendance records. You must have individual time distribution records for your staff who will be charged to the grant (in whole or in part) that allow you to identify all of their time and that segregate costs chargeable to the grant (distinguishing between administrative and programmatic functions) and costs not chargeable to the grant (such as fundraising). Grantees must segregate the financial duties in the office to the extent possible (for example, having one person sign the checks and another reconcile the bank statement). The organization must track specifically all property purchased with federal funds.

The checklist below will help you organize and fulfill your fiscal duties.

Checklist for Setting Up Financial Systems

___ SET UP AMERICORPS ACCOUNT

The AmeriCorps account must be a separate account or have a separate account number.
All Corporation grant awards must be tracked separately.

___ WBRS ACCESS

(For completing Periodic Expense Reports and Financial Status Reports.)

___ TRACKING IN-KIND SERVICES

You are responsible for tracking in-kind services from partners and from your own agency.
This includes donated items as well as staff time.

___ TRACKING CASH MATCH

A system must be developed to track your cash match. Your program is expected to meet your match each quarter.

___ DISBURSEMENT OF STIPENDS

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

Devise a system to reconcile the grantee budget with the approved Corporation budget in the award.

Complete a Financial Management Survey (FMS), available from the Corporation. All new grantees must complete an FMS prior to receiving an award. Grantees are encouraged to complete an FMS annually.

What is the length of time to keep grant records?

In general, you must keep all records for a period of three years or more from the date of submission of the appropriate final financial status report for the period. If an audit is started prior to the expiration of the three-year period, the records must be retained until the audit findings involving the records have been resolved and final action taken. More details are available in 45 CFR § 2541.420.

What are OMB circulars? (AMERICORPS RELATED PROVISION 19)

The OMB circulars cited in your grant address many of the details and specifics governing the management of a federal grant. If your organization has had other federal grants, it should already be familiar with the content. If not, your organization needs to familiarize itself with the circulars. If you have any questions, contact the grants officer assigned to your grant.

What are a program's most common fiscal problems and their consequences?

If your organization does not comply with the grant provisions and OMB requirements, costs that have been charged to the grant can be questioned or disallowed following an audit. If a program's financial management system is seriously inadequate, the granting agency or the Corporation can stop making advance grant payments, suspend funds, terminate the grant, recover funds, or take other legal steps.

Some of the most common problems are:

- ★ inadequate accounting practices;
- ★ poor internal controls;
- ★ inadequate documentation and record-keeping;
- ★ inaccurate financial status reports; and
- ★ undocumented matching contributions, particularly in-kind.

What are allowable costs?

In general, a cost is allowable if it meets the following criteria:

- ★ It is reasonable and necessary for the performance of the grant award.
- ★ It conforms to the limitations and exclusions in the award as to types or amounts of cost items.
- ★ It is consistent with the policies and procedures of the grantee organization.
- ★ It is accorded consistent treatment.
- ★ It is documented adequately.

What is the guidance on liability coverage?

(AMERICORPS RELATED PROVISION 11.D.I, APF PROVISION 11.D.I, AEAP PROVISION 27.A)

Programs must have sufficient liability insurance to protect the organization, employees, and members. Members engaged in both on- and off-site project activities must be covered. You should review your current policies to ensure they cover non-employees in special statuses, such as members. Programs should decide how much liability coverage is sufficient, given the specific risk factors the program presents. General liability insurance is an administrative cost that can be pro-rated and charged against the grant (subject to your grant's administrative cost limit) or included in the program's match. If it is included in the approved budget, insurance purchased specifically to cover member liability can be charged as a direct program cost.

What is the guidance on taxes?

(AMERICORPS RELATED PROVISION 11.D.II, 11.D.III, APF PROVISION 11.D.II, AEAP PROVISION 11.B)

Most programs are required to pay FICA. Under federal law, the FICA payment rate is 15.3 percent of the living allowance. Half (7.65 percent) is paid by the program and half is deducted from the member's living allowance. FICA payments cover Social Security and Medicare benefits. If this is included in your approved grant budget, programs may charge up to 85 percent of the Corporation's share of FICA against the grant.

Withholding income taxes (AMERICORPS RELATED PROVISION 11.D.III, APF PROVISION 11.D.III, AEAP PROVISION 11.B.III)

Under federal tax laws, ordinary income tax rules apply to member benefits. A living allowance is taxable as "compensation for services" and generally is subject to federal withholding. Room and board also may count as income subject to withholding, even though the members do not receive cash. Low-income members may be able to claim an exemption from withholding if (1) they had no tax liability in the previous year, and (2) they expect to have no tax liability in the current year. State income tax withholding laws also apply.

Like all personal income taxes, taxes on the living allowance are the responsibility of the individual member. Members must complete a W-4 form at the start of the term of service. At the end of the tax year, programs must provide members with a W-2 form.

What are the rules about match?

(AMERICORPS RELATED PROVISION 13)

Cost Matching Requirements for AmeriCorps Programs (Excluding AmeriCorps Education Awards programs and the AmeriCorps Promise Fellows Program)

You are responsible for meeting the matching amounts in your negotiated grant award and budget. This amount based on your proposal may exceed the minimum matches required.

Valid documentation of match includes:

- ★ grant award documents from other entities;
- ★ timesheets and in-kind vouchers for services;
- ★ equipment and furnishings receipts for donated items;
- ★ leases and other sources documenting the value of donated space; and
- ★ copies of receipt given to donors of goods and services.

While Education Awards Program sponsors are contributing most or all of the costs of program operation, they are not required to document match contributions.

Fixed amount awards—AmeriCorps Promise Fellows and Education Awards Programs

The AmeriCorps Education Awards and AmeriCorps Promise Fellows programs use fixed-amount awards. The financial requirements for this type of award differ significantly from other AmeriCorps grants.

The Corporation provides a fixed level of support for AmeriCorps Promise Fellows awards based on the specific number of fellows who are enrolled and retained. For education awards programs, the fixed level of support is based on the specific number of members enrolled. Therefore, programs are able to claim federal funds based not on total costs incurred, but on the number of fellows/members as described above.

This method offers considerable benefits to grantees. Financial Status Reports (SF-269A), time and effort reports to program staff, documentation of costs under the Federal Cost Principles, and tracking of match costs are not required. Additionally, federal funds do not have to be itemized by budget categories. As a result, line item budgets have been eliminated from these awards. The fixed amount award is designed to reduce the administrative burden of grantees, and to directly link the awarding of federal funds with the service performed by members. Please refer to your provisions for more information.

How are my responsibilities for fundraising different from those of AmeriCorps members?

(RELATED AMERICORPS PROVISION 5, APF PROVISION 5, AEAP PROVISION 5)

While there are a wide range of activities you may undertake to create a sustainable future for your program, you should keep in mind that certain activities cannot be paid for out of federal grant funds. Before making plans, you should review the Office of Management and Budget (OMB) circular applicable to your organization that spells out the costs that may and may not be charged to your grant. For example, under the OMB circulars, you cannot charge to your grant the costs of “organized fundraising” or expenses incurred “solely to raise capital or obtain contributions.” Staff supported by AmeriCorps grant funds must comply with the OMB limitations while on AmeriCorps time, or not charge the time spent on these activities to the AmeriCorps grant. OMB circulars also require that you keep accurate records regarding time spent on these and your other activities to clearly convey the nature of the activities undertaken.

In general, AmeriCorps members cannot assist their organizations with major fundraising efforts. However, Corporation policy permits some limited activities related to fundraising by AmeriCorps members to the extent that such activities:

- ★ provide immediate and direct support to a specific and direct service activity;
- ★ fall within the program's approved direct service objectives;
- ★ are not the primary activity of the program; and
- ★ do not involve significant amounts of time for any member.

Following are some examples that will help to clarify what you can do with federal grant funds, as well as what you cannot charge to your AmeriCorps grant. Also included are examples of what AmeriCorps members may do, as well as activities that are prohibited for members. Please note that AmeriCorps Promise Fellows are subject to the same rules regarding fundraising as AmeriCorps members.

Program staff may:

- ★ Develop and print materials such as brochures and annual reports to be used for outreach to the general public, which includes potential board members, funders, and community partners.
- ★ Contact individuals and organizations that are potential partners who may assist your program in delivering services.
- ★ Ask your board of directors and other volunteers to raise funds on their own time.
- ★ Pay for a program evaluation to demonstrate the impact and effectiveness of your program.
- ★ Solicit community involvement with or in-kind support for your program—e.g., seek volunteers to help with a project and donations of building supplies for a construction project.
- ★ Coordinate community involvement in a day of service, serv-a-thon, and other direct service activities that may have a fundraising element.
- ★ Include members of the public (including funders and other community partners) on your general mailing list for newsletters or brochures and other general interest publications. (Publications paid for from AmeriCorps grant funds, including matching or other federal funds, should not contain solicitations of donations).
- ★ Include in your general-purpose newsletter a “wish list” of needed in-kind items.
- ★ Invite members of the public, including funders, to make a site visit to your program.
- ★ Ask for advice from individuals with expertise who may be business or foundation staff regarding matters such as program development, training, and evaluation.
- ★ Invite members of the public, including funders and other community partners, to attend graduation ceremonies and other special events.
- ★ Ask a local business to sponsor a recognition event for members or volunteers.

Program staff may not:

- ★ Charge time directly to your AmeriCorps grant for staff to prepare funding proposals.
- ★ Use AmeriCorps grant funds, including matching or other federal funds, to develop promotional materials solely targeted at prospective funders.
- ★ Use AmeriCorps grant funds, including matching or other federal funds, to engage in a direct mail campaign to raise funds.
- ★ Use AmeriCorps grant funds, including matching or other federal funds, to conduct capital campaigns or endowment drives.
- ★ Hire a development consultant and charge fees to your AmeriCorps grant.
- ★ Charge time spent by staff on fundraising to sources of AmeriCorps or other federal grant funds.

Members may:

- ★ Solicit supplies from local businesses for a direct service project—e.g., solicit several cans of paint from a store near a work site to meet a need.
- ★ Organize an occasional “serv-a-thon” in which members recruit individuals to obtain sponsors in advance of an approved direct service event.

Members may not:

- ★ Prepare any part of a grant proposal or perform other fundraising functions to help you achieve your match requirement, or to pay your organization’s general operating expenses.

How are fundraising rules different for AmeriCorps Promise Fellows?

AmeriCorps Promise Fellows are subject to the same rules on fund raising as members in AmeriCorps*State/National programs. These rules are set forth in Section 6 of the AmeriCorps Promise Fellows grant provisions for the 2000-01 program year.

A member's service activities may not include organized fund raising, including financial campaigns, endowment drives, solicitation of gifts and bequests, and similar activities designed for the sole purpose of raising capital or obtaining contributions for the organization.

Service activities that raise funds or in-kind contributions while generation, involving, and/or encouraging community support may be considered appropriate and allowable, such as serve-a-thons, to the extent that they are in direct and immediate support of an approved objective of the Program and provided that they are not the program's primary activity and do not involve significant amounts of an individual member's time.

Prohibited activities for members include preparing grant proposals, performing other fund raising activities to help the Grantee achieve its matching requirements or to support an organization's general operating expenses, and providing fund raising assistance to other community-based organizations that do not provide immediate and direct support to a Grantee's approved Program objective.

In applying this provision, "approved objective" means an objective specifically proposed in your application for AmeriCorps Promise Fellows funding and approved by the Corporation "Program" refers to the AmeriCorps Promise Fellows program carried out by the Grantee and its sub-grantees.

Sustained or substantial fund raising activities related to a Program's approved objectives should be handled by Program or organizational staff such as an executive director or development director. A Fellow may provide a description of his or her activities to support such fund raising efforts, but may not direct, lead, coordinate or otherwise be responsible for sustained or substantial fund raising activities even if they are conducted to support a Program's approved objectives.

Following are examples of the application of these rules in the context of the AmeriCorps Promise Fellows program. This list is provided for illustrative purposes and is not exhaustive. Grantees are responsible for assessing whether particular activities comply with the provisions of their award and the approved objectives of their Program.

AmeriCorps Promise Fellows may:

- ★ Solicit supplies from local businesses for an approved direct service project—e.g., solicit several cans of paint from a hardware store to be used by youth serving in a service learning program created by the Fellow.
- ★ Solicit community involvement with your Program or with a coalition of organizations promoting Promise-related activities—e.g., seek volunteers to serve as mentors in an initiative supported by the Fellow, solicit donated books for a literacy program the Fellow is creating, or recruit organizations to participate in a steering committee to develop a Community of Promise.
- ★ Solicit commitment makers to provide volunteers or in-kind resources—e.g., asking a local corporation to provide paid leave time so employees can volunteer as tutors or obtaining free printing services from a local printer to publish a brochure instructing families how to enroll in a health care program.
- ★ Organize an occasional serve-a-thon in which the Fellow recruits participants who will obtain sponsors in advance of an approved direct service event.
- ★ Coordinate community involvement in a day of service, serve-a-thon, and other direct service activities that may have a fund raising element. However, the Fellow should not coordinate the fund raising component of the activity.
- ★ Include members of the public (including funders and other community partners) on a general mailing list for newsletters, brochures, publications, and other educational materials regarding the Fellow's activities.

AmeriCorps Promise Fellows may not:

- ★ Write a grant proposal requesting funding to support the host organization's cost of hosting a Fellow.
- ★ Sell tickets to a fund raising event to raise money for an organization's general operating expenses.
- ★ Write a grant proposal to raise operating support for a new mentoring program the Fellow is implementing.
- ★ Solicit a financial commitment from a local corporation to contribute a percentage of its profits to Community of Promise partners.

How do I receive grant funds?

Your contact agency has an account with the Department of Health and Human Services from which your grant funds will come. To transfer money directly to grantees, including state commissions, national parent organizations, tribes and territories, and certain Education Awards and Promise Fellows grantees, the Corporation uses a system called SmartLink, managed by the U.S. Department of Health and Human Services (HHS) Division of Payment and Management. This system allows grantees to access and request funds electronically and have money deposited into their accounts in one day. The Corporation allows them to draw funds in advance of expenditures. However, they must only keep an amount of cash on hand to meet immediate expenses.

State commissions and national parent organizations must use their own systems to distribute funds to sub-grantees. These systems vary based on state and organizational capability.

All direct grantees must establish an account with HHS before an award will be issued. You must complete a Standard Form 1199A Direct Deposit Sign-Up Form and submit it to the Corporation in order to establish an account.

How can I change the grant?

Changes in the grant that do not involve the budget

You must obtain written approval for significant program changes to the grant. Consult your contact agency listed on page 24. Examples of program changes that require prior written approval of the granting agency:

- ★ changes in the scope or goals of the program;
- ★ changes in the start and end dates of a grant;
- ★ increasing the number of members beyond the maximum; and
- ★ decisions to sub-grant or sub-contract out AmeriCorps activities not previously contemplated or approved.

Unused funds budgeted for living allowances and benefits

These budget line items include living allowances, FICA, workers' compensation, and health care. These budget line items are directly related to the number of members that you agreed to enroll. If you fail to meet the program's enrollment target or if members drop out, you cannot use the funds to pay for other costs.

Examples of budgetary and organizational changes that require the prior approval of the Corporation:

- ★ The reallocation of funds from any of the line items included in the "Member Support Costs," including living allowance, FICA, workers' compensation, health care, and alternative health care; and the member training line item in "Other Member Support Costs."
- ★ Significant reductions in the match commitment.
- ★ Purchases of equipment over \$5,000 unless specified in the grant award budget.
- ★ The transfer of the grant or sub-grant to a different organization.

What are my audit requirements?

(AMERICORPS RELATED PROVISION 21.D, APF PROVISION 22.C, AEAP PROVISION 21.B)

Recipients of federal grant awards who spend \$300,000 or more in total federal awards are required to have audits performed in accordance with OMB Circular A-133. OMB Circular A-133 can be found at www.whitehouse.gov/omb/circulars/a133/a133.html.

A-133 Audit

When applicable, an A-133 audit requires that you have an audit of your entire organization conducted by an independent auditor that essentially determines:

- ★ if your organization's financial statements present its and the program's financial position fairly;
- ★ if the institution has the internal control structure to ensure that the program is managing the award in accordance with the applicable federal laws and regulations; and
- ★ that the program has complied with the applicable laws and regulations that may have a direct and material effect on the program's financial statement.

For clarification on these and any other financial management issues, you should contact your state commission or parent organization. Direct grantees should contact the Corporation's Office of Grants Management.

Managing Education Awards

How do education awards work?

Once your members complete their term of service you are responsible for beginning to process their education award.

For programs not using WBRS: all state commissions and parent organizations must provide the Trust with a list of the individuals who have been given the authority to verify the information on members' Enrollment and End of Term/Exit forms. The National Service Trust must have on record the names of all authorized certifying officials for every project site.

When an End of Term/Exit form arrives at the Corporation, the signature is checked against the list of certifying officials that have been turned in to the Trust. Any End of Term/Exit form that does not have the signature of an authorized official will be returned to the state commission or national parent organization, along with a request for certification. Returning these forms will delay the members' receipt of the education award.

The National Service Trust must be kept updated of any changes in the designation of certifying officials. A copy of the Designation of Authorized Certifying Official form is included in the appendix (page 131) and it may be photocopied. Please make sure that the site ID number (normally a 14-digit code) is included for each site.

If you are using WBRS: when program directors are assigned a username and password to WBRS by their state commission or parent organization, WBRS automatically supplies their name to the National Service Trust as authorized certifying officials who have been given authority to verify the information on members' enrollment and exit forms. Programs using WBRS will no longer have to use the Designation of Authorized Certifying Official Form. In addition, paper forms for certifying officials do not have to be used or maintained.

Copies of a handout on the education awards and student loan forbearance will be sent by the Corporation to state commissions, national parent organizations, and tribes and territories for distribution. Detailed information also will be available on the Corporation's website. In short, the educational benefits are provided from a special account in the United States Treasury called the National Service Trust. To qualify for an education award, members must complete the required "term of service" successfully. The award for full-time service is \$4,725; the award for part-time service is \$2,362.50 or the reduced amount education award specified in your grant.

Pro-rated education awards may be given if a member has been released for compelling personal circumstances and has served at least 15 percent of the term of service.

Members may receive no more than two education awards, regardless of the type, for their first two terms of national service. An education award can be a full-time award, part-time award, or a reduced part-time award. A prorated education award is considered to be an education award. (See page 117 for maximum terms of service.)

If a member leaves the program for cause (not for compelling personal circumstances) and has served at least 15 percent of the required term, that term “counts” as one of the first two terms for which the member is eligible to earn an award.

If a member has completed less than 15 percent of the required term of service, and if the member was released for reasons other than misconduct, that term will not be considered one of the first two terms for which an individual may receive an award. The test in this situation is “misconduct,” not “compelling personal circumstances.” In that case, the program must request a waiver from the Trust Office.

What are the requirements for earning an education award?

A member must not only complete the minimum number of hours for full-time or part-time, but also meet the performance standards established by the program. In addition, the member must serve for the duration of the service program as established. For example, if a program is an 11-month program with a minimum of 1,800 hours, the member is required to meet those objectives before being certified as eligible for the education award. Such requirements must be delineated in the member contract.

Effective during program year 2002-2003 member terms of service will fall under distinct categories based on the hours of service completed. Members will receive an education award according to the following chart:

<i>Term</i>	<i>Hours completed</i>	<i>Value of Education Award</i>
Full-time	at least 1700	\$ 4,725.00
Half-time	at least 900	\$ 2,362.50
Reduced half-time	at least 675	\$ 1,800.00
Quarter time	at least 450	\$ 1,250.00
Minimum time	at least 300	\$ 1,000.00

Length of service (AMERICORPS RELATED PROVISION 8)

Minimum service requirement for AmeriCorps members

(AMERICORPS RELATED PROVISION 8.A, APF PROVISION 8.A, AEAP PROVISION 8.A)

The term of service must be defined as including at least 1,700 hours of participation over a period of 9 to 12 months for full-time members or at least 900 hours over a period of up to two years for part-time members. Members can serve a reduced term of fewer than 900 hours if approved and contained in the grant agreement. Holidays, leave time, and other absences may not be counted toward service hours, but should be included in the programmatic year.

A term of service for an AmeriCorps Promise Fellow is between ten and twelve months.

Members’ terms of service must be defined in the member contract. The program must provide contracts to the members upon their acceptance into the program.

What are the maximum terms of service?

Number of education awards (AMERICORPS RELATED PROVISION 12, APF PROVISION 12, AEAP PROVISION 12)

Under no circumstances will an individual be eligible to receive more than two education awards. These can be earned during the first two terms of national service. Even if a member does not complete his or her service requirement and does not receive an education award, that term of service counts as one of his or her first two terms.

Serving more than two terms

The national service laws and Corporation policies impose certain restrictions within the various programs on the number of terms an individual may serve within that program. The following table outlines the limitations on the number of terms one may serve within the different AmeriCorps programs.

<i>AmeriCorps National Service Network</i>	<i>Maximum Number of Terms within each type of AmeriCorps Program</i>
AmeriCorps*State/National/ITT/Leaders	2
AmeriCorps*NCCC	2
AmeriCorps*VISTA	3
AmeriCorps Promise Fellows	2

(The AmeriCorps*State/National and Indian Tribes and Territories programs include the special categories of Education Awards programs, and America Reads programs.)

The Corporation has determined that individuals may, nonetheless, serve up to three terms of service across the different types of AmeriCorps programs and may receive Corporation-funded member benefits as long as the caps on the number of terms of service within each program are maintained. In no event may an individual serve more than a total of three terms in any combination of AmeriCorps programs. A term of service includes full-time, part-time, and reduced part-time service, as well as an uncompleted term (e.g., if a member leaves a program part-way through the term).

The following table shows the different possibilities for individuals interested in serving more than one term. While other combinations totaling three terms may also be permissible (including service in Education Awards programs, for example), under no circumstances will an individual be eligible to receive more than two education awards.

If you have completed one term in...	and you have completed a second term in...	Then you can serve a third term in...
AmeriCorps*VISTA	VISTA	VISTA AmeriCorps*State or National NCCC Promise Fellows
	AmeriCorps*State or National	VISTA AmeriCorps*State or National NCCC Promise Fellows
	NCCC	VISTA AmeriCorps*State or National NCCC Promise Fellows
	Promise Fellows	VISTA AmeriCorps*State or National NCCC Promise Fellows
AmeriCorps*State or National	VISTA	VISTA AmeriCorps*State or National NCCC Promise Fellows
	AmeriCorps*State or National	VISTA NCCC Promise Fellows
	NCCC	VISTA AmeriCorps*State or National NCCC Promise Fellows
	Promise Fellows	VISTA AmeriCorps*State or National NCCC Promise Fellows
AmeriCorps*NCCC	VISTA	VISTA AmeriCorps*State or National NCCC Promise Fellows
	AmeriCorps*State or National	VISTA AmeriCorps*State or National NCCC Promise Fellows
	NCCC	VISTA AmeriCorps*State or National Promise Fellows
	Promise Fellows	VISTA AmeriCorps*State or National NCCC Promise Fellows

If you have completed one term in...	and you have completed a second term in...	Then you can serve a third term in...
AmeriCorps Promise Fellows	VISTA	VISTA AmeriCorps*State or National NCCC Promise Fellows
	AmeriCorps*State or National	VISTA AmeriCorps*State or National NCCC Promise Fellows
	NCCC	VISTA AmeriCorps*State or National NCCC Promise Fellows
	Promise Fellows	VISTA AmeriCorps*State or National

Members without high school diploma or equivalent

(RELATED AMERICORPS PROVISIONS DEFINITIONS K.IV.7, AEAP DEFINITION H.IV, APFP DEFINITION I.IV)

Individuals who do not have a high school diploma or equivalent upon entering AmeriCorps must agree in writing before enrolling in the program to obtain a high school diploma or its equivalent prior to using the education award, unless the program has conducted an educational assessment that indicates the member is incapable of obtaining a high school diploma or its equivalent. The grant provisions and the regulations (45 C.F.R. § 2522.200) list exceptions to this requirement. If the member successfully completes the term of service, he or she is eligible for an education award, which he or she may use after obtaining a high school diploma or equivalent.

For members who are school dropouts, programs must provide support services to help them get a high school diploma or equivalent certificate before exiting the program. Programs also may want to provide college readiness programs for members going on to higher education. Both high school/GED programs and college readiness programs can be integrated effectively with service-learning curricula. Members must have their high school diploma or equivalent, or obtain a waiver, to access their education awards.

Effective in the 2002-2003 program year, member files do not need to include high school diploma or equivalent, if the completed member enrollment form with a signed self-certification regarding educational level is maintained in the member files.

Are AmeriCorps members eligible for loan forbearance?

AmeriCorps members are eligible to have the repayment of certain student loans postponed while they are earning an education award. This postponement—called forbearance—is not automatic. Members must request it from their loan holders with the National Service Forbearance Request Form on page 135 of this handbook, which can be photocopied. The National Service Trust does not grant forbearances; the loan holders do. The Trust merely verifies membership in AmeriCorps and forwards the documents to the loan

companies. The Trust is able to verify membership only when it has proof from a project that the individual is an AmeriCorps member.

There are various ways to postpone the repayment of qualified student loans. While members may also be eligible for other types of deferments or forbearances, each with their own special circumstances and limitations, they are encouraged to request forbearance based on national service. If a member wants forbearance based on national service, they should make it clear to their loan holder that they are requesting forbearance for their “national service” in “AmeriCorps.” They should use these two terms when requesting forbearance.

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

Under this forbearance, the interest continues to accrue on qualified loans during a member’s term of service. Upon the successful completion of their service, the Corporation for National Service will pay, on behalf of the borrower, all or a portion of the interest that accrued during the service period. This benefit is intended to enable an individual with an outstanding debt to participate in AmeriCorps. This is a benefit above and beyond the education award. The interest payment is not deducted from the amount of the award.

How do I help members get forbearance for their qualified loans?

Members must request forbearance from their loan holders. They can do this by completing a “Forbearance Request for National Service Form” for each lending institution that services their loans. Member should request forbearance as soon as they begin their term of service; they do not have to wait until their enrollment information is in WBRS.

- ★ Members complete the first section marked “Member Section” and return it to their program site.
- ★ Do not sign the Corporation Certification.
- ★ Send the forms to the National Service Trust at the address on the form. If you forward requests to the Trust with a cover memo indicating the name and social security number of each member whose form is submitted, a copy of the member’s signed forms will be returned to the program site for the members’ records. The Trust mails the originals to the loan holders.
- ★ Please send the requests for forbearance in bundles. This allows forbearance forms to be processed before enrollment information has been entered in WBRS. The Trust will certify each member’s enrollment and send the form to the designated loan holder.

If a member does not automatically hear from his or her loan holder within three weeks of submitting the form to the Trust, he or she can call the loan company to make sure the form has been received and the forbearance granted. Some lending institutions may ask the borrower for additional information or require the completion of their own form to request forbearance. The AmeriCorps member should follow the

lender's procedures and give those forms to the project site for forwarding to the Trust, just as with the standardized form. The Trust will verify enrollment and send the form to the lending institution.

Loan forbearance request forms must be sent by the program director to the contact agency listed on page 24 as soon as possible after the individual becomes an AmeriCorps member.

Are AmeriCorps members eligible for interest payment while serving?

Yes. Below is an outline of how this process works.

Exit information must be entered in WBRS and approved by your contact agency listed on page 24 as soon as the member ends his or her service. The information will then be sent to the Trust. The Trust is unable to make an interest payment until it has proof that the member has completed service and has earned an award.

Toward the end of the service term (not at the start of service), members should complete an Interest Accrual Form and send it to each of their loan holders, not to the Trust. The copy of the form on page 136 can be photocopied for your use. This form asks the loan holder to compute the total amount of interest that accrued between the beginning and ending dates of their service and gives the loan company permission to provide that information to the Trust.

The loan holder will complete its section and send the form to the Trust. Members can request that they be sent a copy of the information that is sent to the Trust for their own records. The interest payment will be made to the loan holder, not the member. The Trust will pay all or a portion of the interest that accrued during the term of service, even if the member made interest payments during his or her service. Remember, the Trust can pay the interest if the qualified loan was placed in forbearance and if the member received an education award for the service.

According to the IRS, in most cases awards are subject to income taxes in the calendar year in which they are used (not earned). Likewise, interest paid by the Trust is subject to income taxes. The Corporation does not withhold taxes, since it does not know the tax bracket the member will be in for that particular year. The Corporation sends members an IRS Form 1099 to be used in preparing income tax returns.

The portion of the interest that the Trust will pay is based on a formula in the Trust's regulations. That formula takes into account both the number of hours of service and the forbearance (or service) period. Based on the formula, for a member who completes a full-time, 1,700-hour term of service within one year, the Trust will pay 100 percent of the interest that has accrued. For a member who completes a part-time, 900-hour term of service in one year, the Trust will pay approximately 50 percent of the interest that has accrued. Generally, the longer it takes a part-time member to complete the 900-hour term of service, the smaller the percentage of interest the Trust will pay.

How can the education award be used?

An AmeriCorps member may use the education award to:

- ★ Repay qualified student loans
- ★ Pay for current educational expenses at a Title IV institution of higher education. The term “current” educational expenses means expenses incurred for a period of enrollment in an institution of higher education that begins after an individual enrolls in a term of service as an AmeriCorps member.
- ★ Pay for expenses incurred in participating in an approved school to work program.

Members can split up their awards to pay a combination of student loans and/or educational expenses. Not all schools or loans are eligible. See the following section for a description of “qualified loans.” The payment will be made to the school or loan holder designated by the member. It cannot be made to the AmeriCorps member. However, as with other federal student assistance, schools may pass on to students certain allowances that are included in the cost of attendance or reimburse students for certain expenses they paid for out-of-pocket. Members have seven years from the end of their term of service to use the awards. A report on how to maximize the benefit of the Education Award, completed by National Service Fellow Brandon Rogers, can be downloaded from the Corporation for National and Community Service website at www.etr.org/nsrc/pdls/fellows/rogers.pdf.

What current educational expenses are covered by the education award?

If an individual is enrolled in a Title IV eligible program at a Title IV institution of higher education, he or she may use his or her education award to pay for the cost of attending either as a full-time or part-time student. “Cost of attendance” (COA) is a term used by a school’s Financial Aid Office following rules established by the U.S. Congress and the Department of Education.

The COA is the school’s determination of what it will cost a student to go to school for a particular period of time. For a full-time student, it can include tuition and fees, an allowance for books, an allowance for room and board, an allowance for transportation, an allowance for rental or purchase of a computer, and other expenses.

Every Title IV school determines the COA for its students—this is not an amount determined by the member nor by the Trust. This is the amount the school will use to calculate the amount the member is eligible for when completing the Voucher and Payment Request form. The education award can be used to pay that portion of the COA that is not already covered by other sources of financial assistance. A member should be able to find out from the financial aid office what the COA is for a student in a particular program at the school.

Individuals may, however, use the education award to pay for current educational expenses at a Title IV institution of higher education even if the individual is not enrolled in a degree-granting program. For example, an individual may be able to use the education award toward a continuing education course at a

Title IV school. As with the cost of attendance, the school will determine what expenses the education award will cover under these circumstances.

Usually, when the school receives the check from the Trust, the school will keep the amount that is due the school (such as tuition, fees, and, if applicable, dorm fees) and will turn over to the student any of the allowances due the student—e.g., the book allowance, transportation allowance, and room and board allowance (if the full-time student is living off campus). This reimbursement is handled in a variety of ways—some schools write the student a check, while others establish an account in the student's name. The school may also reimburse students for these allowable expenses that were previously paid for by the student, as long as the costs are for "current education expenses."

Members should not take their education award vouchers to bookstores or landlords. Checks can only be made directly to qualified schools (and holders of qualified loans).

What are qualified loans?

The AmeriCorps legislation defines a "qualified" student loan as a loan backed by the federal government under Title IV of the Higher Education Act (except PLUS loans to parents of students) or under Titles VII or VIII of the Public Health Service Act. Now, in addition, a provision in the 2002 appropriations law has expanded this definition to include loans that cover all or part of the student's cost of attendance and that are made directly to the student by a state agency.

For purposes of the AmeriCorps education award, the term "state agency" includes state institutions of higher education. Thus, any loan, including short-term loans, made directly to the student by a state institution of higher education is a qualified loan and the student may repay such a loan with the AmeriCorps education award. If a loan is guaranteed by a state agency (such as a state's Higher Education Authority) but is not made by a state agency, the loan is NOT qualified. A qualified loan must be made by a state agency.

The "maker" of every loan should be listed on the loan's Promissory Note. The maker is the entity that originally issued the loan to the student. The maker of the loan does not change, even if the loan is purchased by another loan company. Thus, a promissory note is the best evidence of who originally made the loan. When a loan is refinanced or consolidated a new loan is created. The new loan must meet the definition of "qualified student loan" in order for the payment to be made using the educational award. The original loan no longer exists.

Some of the most common qualified loans are:

- ★ Stafford Loans
- ★ Perkins Loans
- ★ Federal Direct Loans
- ★ Supplemental Loans for Students (SLS)
- ★ Federal Consolidated Loans
- ★ Health Education Assistance Loans (HEAL)

- ★ Health Professions Student Loans (HPSL)
- ★ Loans made directly to members by a state agency

Members can use their education awards to repay defaulted student loans, as long as the loans meet the definition of "qualified student loan" described above. If you have any questions about whether a loan meets the definition, please contact the National Service Trust at (888) 507-5962.

What are qualified schools?

For the purposes of the education award, a "qualified institution of higher education" is an institution that has a Title IV Program Participation Agreement with the U.S. Department of Education. This simply means that the school has an agreement with the Department of Education whereby students at the school are eligible to receive federal financial assistance (backed by the Department of Education under Title IV of the Higher Education Act) to attend the school.

An institution may be fully accredited, even offering graduate degrees. However, unless it is a school that participates in the U.S. Department of Education's Title IV financial assistance programs—i.e., a "Title IV school"—the education award cannot be used there.

How do I start to process the education award?

Since an education award cannot be made until verification is received that a member has completed service, it is especially important that you send the exit information to the state commission, parent organization or Corporation program officer (for Tribes, Territories and other direct grantees) immediately upon the completion of service. It will then be downloaded from WBRS to the Trust's database.

If you are using WBRS: your members must complete and sign a paper Enrollment Form at the time of enrollment into a program, and a paper End of Term/Exit Form upon completion of service. Data from these forms should be entered by the program into the online versions in WBRS and approved by the program director. WBRS automatically submits these forms to the National Service Trust at the Corporation for National and Community Service. Since an education award cannot be made until verification is received that a member completed service, it is especially important that the Exit Form be submitted through WBRS immediately upon the completion of service.

Non-WBRS users should forward the original enrollment and exit forms to their commission or parent organization, if required, or directly to the Trust. This should be done immediately upon completion of service.

Because these forms—both those on-line in WBRS and paper forms—are used to determine eligibility for education awards, submitting false or fraudulent Enrollment or End of Term/Exit forms could lead to criminal or civil penalties against those involved in submitting the forms.

Within 30 days of the Trust receiving the End of Term/Exit Form (either paper or from WBRS), a voucher should be mailed to the member, along with a set of instructions on how to proceed. The member will fill out a portion of the voucher and submit it to the institution. The institution will complete another section and will send it to the National Service Trust for payment. The payment will be made to the institu-

tion and a notice will be sent to the member, along with a new voucher reflecting any balance in the member's education award account.

Are education awards taxed?

Yes. The IRS has determined that education awards are considered taxable income in the year they are used. If a member uses a portion of an education award in a particular year, only the portion used will be subject to income taxes for that year. If no payment is made from a member's account during a year, there is no tax liability from the award. Likewise, payments the Trust makes for interest that accrued on qualified loans are taxable.

The Taxpayer Relief Act of 1997 created the Hope Scholarship Credit, the Lifetime Learning Credit, as well as a deduction for certain interest payments on qualified student loans. These benefits, which first became available for expenses incurred in 1998, mean that many AmeriCorps members will be able to obtain substantial—in some cases, full-relief from federal taxes on the use of their education awards. The Corporation cannot provide individualized assistance in utilizing these deductions. However, further information about these credits can be obtained from:

- ★ The IRS, www.irs.ustreas.gov/prod/hothot/not97-60.html; phone: (800) 829-1040. Or request IRS Publication 970, Tax Benefits for Higher Education, by calling
- ★ (800) TAX-FORM ((800) 829-3676) or by downloading it from the IRS website;
- ★ The Department of Education, www.ed.gov/inits/hope, or
- ★ AmeriCorps Alums, www.americorpsalums.org/edtax.html.

Every January, an IRS form 1099 is mailed to each member who has had interest or education award payments made during the previous year. This notifies members of the amount of miscellaneous income to include on their tax returns. The Trust reports to the IRS all of the payments made on behalf of members for that year. The date the check is issued by the U.S. Treasury (rather than the date requested or the date received) determines the tax year for which the payment is reported.

What National Service Trust Forms do I need?

Programs using WBRS will no longer submit the paper Enrollment, Change of Status and Exit forms. Members will continue to complete and sign them so their information can be submitted to the Trust using WBRS. The paper forms with the members' signatures on them should be kept in each member's file. You should consult the WBRS on-line Manual for detailed instructions on how to enroll and exit members using WBRS. Member enrollment and exit forms can be downloaded from www.wbrs.net.

Whom can I contact with questions regarding the education award?

Trust Information for Members

(888) 507-5962, Trust Helpline
Recorded messages about various aspects of the Trust.

Members may use this number to access the following recorded information:

- ★ general information about the education award
- ★ how to receive the education award
- ★ how to use the voucher
- ★ answers to 1099 tax reporting questions
- ★ report an address change
- ★ request new vouchers

Members may request duplicate vouchers or report address changes by e-mailing: edawardvoucher@cns.gov

Trust Information for state commissions, National Direct Parent Organizations, and Program Directors

For questions about the status of a specific award or specific payments, call the Trust Office at (202) 606-5000, x347

For questions about forbearance, call (202) 606-5000, x472. To learn if a particular school (including foreign schools) is a “Title IV school” (one at which an education award can be used), see the Title IV School Code List at www.ed.gov/offices/OSFAP/Students/apply/search.html.

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AMERICORPS - VOUCHER AND PAYMENT REQUEST FORM

for AmeriCorps Member:

SSN: _____

AmeriCorps ID: 00220904
Annual Balance: \$4,725.00 **Valid Until:** 02/23/2004
Total Current Balance in Account: \$4,725.00

(1) Indicate the amount of the payment that you request:

Use only one number in each box

\$, .

I understand the amount indicated in the blocks above to be paid to the loan holder or educational institution named below. I certify that I have not been convicted, since the completion of any AmeriCorps service, of the possession or sale of a controlled substance. I understand that a knowing and willful false statement on this form can be punished by a fine or imprisonment or both under Section 1001 of Title 18, USC. (If you are unable to make this certification, please write to the National Service Trust to find out what you must do to be eligible to use the award.)

(2) Signature of Member _____

(3) Today's Date

Month Day Year
 / / 200

IF THIS PAYMENT IS FOR A QUALIFIED STUDENT LOAN, THE LOAN HOLDER MUST COMPLETE THIS SECTION

1. Type of Qualified student loan: _____

A qualified student loan for the purposes of the education award is a loan made, insured, or guaranteed pursuant to Title IV of the Higher Education Act of 1965, other than a loan to a parent of a student pursuant to section 402B of such Act; any loan made pursuant to Title VII of VHE of the Public Health Service Act; and loans made directly to students by the Alaska Commission on Postsecondary Education.

2. Payoff Amount (add 30 days interest):

\$, .

The organization listed below is the holder of the loan (which is defined as the original lender or another party or institution to which the loan was subsequently sold, transferred, or assigned and which has a legally enforceable right to receive payment from the borrower).

IF THIS PAYMENT IS FOR CURRENT EDUCATIONAL EXPENSES, THE TITLE IV SCHOOL OR SCHOOL-TO-WORK PROGRAM MUST COMPLETE THIS SECTION

1. Amount for which student is eligible. All student aid, including the educational award, cannot exceed the Cost of Attendance.

\$, .

2. Title IV School Code: _____

3. School enrollment period upon which this amount is based. No less, a payment is made in two equal installments: one at the beginning and one at the middle of the enrollment period.

start date: _____ end date: _____

The individual named above is a student in a degree or certificate program or other program that leads to a recognized educational credential at the institution listed below, which has in effect a Title IV Program Participation Agreement with the U.S. Department of Education. Eligibility to participate in any of the Title IV programs has not been denied, suspended, or terminated. Further, the number students using an award in the current academic year is not more than 10% of the total student population.

I certify that all of the information I have provided above is true and correct. I understand that a knowing and willful false statement on this form can be punished by a fine or imprisonment or both under Section 1001 of Title 18, USC.

Signature of authorized representative of the school or loan holder _____

Telephone Number _____

Printed or typed name and title of the representative _____

Date _____

Name of School or Loan Holder (Payee): _____

Address _____

City _____

State _____

Zip Code

-

Student Temporary ID Number _____

IF THE PAYEE HAS ALREADY COMPLETED A DIRECT DEPOSIT SIGN-UP FORM (OMB NO. 1545-0007), THE PAYMENT WILL BE MADE TO THE PAYEE'S ACCOUNT THROUGH AN ELECTRONIC FUNDS TRANSFER (EFT). IF NOT, A CHECK WILL BE MAILED TO THE PAYEE AND A DIRECT DEPOSIT SIGN-UP FORM WILL BE MAILED TO THE PAYEE TO COMPLETE AND RETURN TO THE TRUST FOR FUTURE EFT PAYMENTS.

MAIL VOUCHER TO: NATIONAL SERVICE TRUSTS/CS; 1201 NEW YORK AVENUE N.W., WASHINGTON, D.C. 20025

PRIVACY ACT NOTICE: In compliance with the Privacy Act of 1974, the following information is provided. The collection of this information is authorized by the provisions of the National Community Service Act of 1993, as amended. This form is used by AmeriCorps members to request a payment if their funds allocation cannot be covered by either their service agency or the program, and by both parties to verify within legal requirements. No information will be disclosed outside the Corporation without written permission. The National Community Service Act requires that the allocation award is made based on the year interest. Follow the instructions listed hereafter or any other information you receive in the program being delayed or denied. PUBLIC INFORMATION: 02/2003 - National Trust to complete this form, including also the printing instructions and gathering & filling in information if it applies. Read comments regarding this form on the content of the Award to the National Service Trust in the student hand book. Responses to it are required to fill out the form when telephone a valid email contact number on the page. Also if you have questions.

NSR Form 2002-004

Guidelines and Uses for the AmeriCorps Education Award

Information for Loan Holders, title IV Educational Institutions, and School-to-Work Programs

THE VOUCHER AND PAYMENT REQUEST FORM that accompanies these guidelines verifies that the former AmeriCorps participant whose name appears on the form has earned an education award under the National and Community Service Trust Act of 1993. By law, this award can be used:

1. to repay outstanding qualified student loans,
2. to pay for the cost of attendance at a qualified institution of higher education, or
3. to pay for expenses incurred while participating in a School-to-Work Opportunities system that has been approved by the U.S. Departments of Labor and Education.

TO RECEIVE PAYMENT, **the former AmeriCorps participant must complete and sign Section A of the voucher.** This authorizes us to take funds from his or her account. **The loan holder, educational institution, or School-to-Work Program must complete Section B.** This will certify that the payment is for a qualified student loan or for approved educational expenses at a qualified institution of higher education or School-to-Work Opportunities system. Please make sure that the address you give is the full address where the check should be sent. Mail the voucher to the Trust at the address on the voucher. Within four weeks of the Trust receiving a properly completed voucher, the institution will be mailed a check by the U.S. Treasury. The check will contain the AmeriCorps participant's name and social security number, as well as a brief statement identifying the payment as an education award for national service.

- A new voucher must be signed and dated for each payment
- Vouchers should not be faxed to the Trust. This is to prevent duplicate and unauthorized payments.

IF THE PAYMENT IS FOR A QUALIFIED STUDENT LOAN, we have informed the AmeriCorps member that loan payments generally are applied first to outstanding interest, then principal. If the member wishes the payment to be applied differently, he or she must contact you directly. The National and Community Service Act states that payments are to be applied in accordance with the member's decision; therefore, unless you are otherwise prohibited by law from doing so, you are required to apply this payment in accordance with the member's decision.

Examples of qualified student loans are: Federal Stafford Loans, Federal Perkins Loans, Federal Direct Student Loans, Federal Consolidated Loans, Supplemental Loans for Students, and Public Health Service Loans. Recent legislation includes loans made directly to students by a state institution of higher education. See the voucher for the legal definition of qualified loans.

IF THE PAYMENT IS FOR EXPENSES TO ATTEND A QUALIFIED EDUCATIONAL INSTITUTION, the award can be used for more than tuition and books; it is intended to pay for any items included in "cost of attendance" (as defined by the Department of Education and outlined in the Federal student Financial Aid handbook) that are not already covered. As with other federal student assistance, you may pass on to the student certain allowances that are included in the "cost of attendance." The education award can be used for any portion of the student's "cost of attendance" that is not already covered by other sources of financial assistance. Payments are made in two equal installments; one at the beginning and one at the middle of the enrollment period.

Qualified institutions are institutions that have in effect a Title IV Program Participation Agreement with the U.S. Department of Education Title IV schools. See the voucher for additional requirements for accepting the award.

Due to changes in the Higher Education Act, the education award may be considered by financial aid offices in determining eligibility for certain types of Federal student aid. If you have any questions as to the appropriate treatment of the education award in determining a student's financial aid package, you should contact your regional U.S. Department of Education office or your regional Institutional Accrediting Association.

IF THE STUDENT WITHDRAWS OR OTHERWISE FAILS to complete the period of enrollment for which this assistance is provided and is entitled to a refund, the amount of the refund shall be determined under the fair and equitable refund policies required by the U.S. Department of Education under the Higher Education Act. Such refund shall be paid to the National Service Trust.

The Trust has a new toll-free number: 1-888-507-5962.

National Service Trust/CNCS • 1201 New York Avenue, N.W. • Washington, DC 20525

1201 New York Avenue, N.W., Washington, D.C. 20525 (202) 606-5000

Designation of Authorized Certifying Official

The individual(s) listed below have or have been delegated the authority to sign as the Authorized Certifying Official on the National Service End of Term of Service Form. Certifying Officials are responsible for certifying the completion of members' terms of service.

Name(s) of Individual(s): _____

Name of Project: _____

Name of Legal Applicant: _____

Site ID Number: _____

Fourteen (14) digits required

Please send this form to the organization/individual listed as your contact on page 24 of this Handbook.

Note: Commissions, Parent Organizations, Tribes and Territories

Once you have received this form from your programs and/or sites, please send to:

National Service Trust
Corporation for National and Community Service
1201 New York Avenue, N.W.
Washington, DC 20525

Or fax to:

National Service Trust
(202) 565-2780

1. Mark your gender.

- Female
 Male

2. Mark your citizenship status.

- U.S. Citizen
 U.S. National
 Legal Permanent Resident Alien of the United States

3. Are you registered to vote?

- Yes
 No
 Not sure
 Not eligible
 Prefer not to respond

4. (Optional) Which of the following categories best describes your racial or ethnic origins? (Mark one or more from A and one from B.)

A. Race

- American Indian or Alaska Native
 Native Hawaiian or Other Pacific Islander
 Black or African American
 White
 Asian

B. Ethnicity

- Hispanic origin
 Not of Hispanic origin

5. Which one of the following best describes your marital status?

- Single, never married
 Married, living with husband/wife
 Married, not living with spouse/legally separated
 Widowed
 Divorced
 Prefer not to respond

6. What is the highest level of education you have completed?

- Less than high school completed
 GED
 High school graduate
 Technical school/apprenticeship
 Some college
 Associate degree (AA)
 College graduate
 Some graduate school
 Graduate degree

I certify that:

- I have received a high school diploma or its equivalent or
 I agree to obtain a high school diploma or its equivalent and did not drop out of elementary or secondary school to enroll in the program; or
 I am enrolled in an institution of higher education on an ability to benefit basis and am eligible for federal student financial assistance.

(The Corporation may waive this requirement if an independent evaluation demonstrates that you are not capable of obtaining a high school diploma or its equivalent.)

Member's Signature: _____

Date: _____

I understand that a knowingly and willful false statement on this form can be punished by a fine or imprisonment or both under Section 1001 of Title 18, U.S.C.

Privacy Act Statement - In accordance with the Privacy Act of 1974, the following information is provided. The collection of this information is authorized by the provisions of the National and Community Service Act, as amended by the National and Community Service Trust Act of 1998. The primary purpose of the information is to enroll individuals in the National Service Trust in order to receive and use an AmeriCorps education award. Additionally, for individuals who have indicated their desire to register with the Selective Service System, the information collected on page 1 will be provided to the Selective Service System for that purpose. Except as indicated above, no information will be disclosed outside the Corporation without written permission. The Internal Revenue Service has determined that this information exempt by statute through the year it is used. Your Social Security Account Number (SSAN) is collected under the authority of the Internal Revenue Code (26 U.S.C. 6011(b) and 6049). It may be used as a tax paper identification number. Failure to disclose the SSAN or any other information may result in a denial of your being enrolled in an AmeriCorps program or it may delay the processing of your education award.

7. Do you have a disability?

- Yes (Specify: _____)
 No
 Prefer not to respond

8. Are you a veteran of the United States Armed Forces?

- Yes
 No

9. What are the two most important reasons why you decided to join this program?

- To get an education award
 To help other people/perform a community service
 To be part of a national movement
 To get a job/earn money
 Friends have joined
 To make friends
 To learn about or work with different ethnic/cultural groups
 Parents/teachers wanted me to join
 To explore future job/education interests
 To get involved in health issues
 To get involved in education issues
 To get involved in environment issues
 To get involved in public safety issues
 Other (Specify: _____)

10. How did you hear about this program? (Mark all that apply.)

- Read about it in an article
 Saw an advertisement in a newspaper/magazine
 Guidance counselor/teacher
 Parent/sibling
 Current or former AmeriCorps Member
 Friend told me/friend applied
 Heard about it on TV commercial
 Heard about it on radio commercial
 Heard about it on the internet
 Heard about it from an AmeriCorps recruiter/representative
 Received information in the mail
 AmeriCorps Program
 Poster
 Other (Specify: _____)

DIRECTIONS

Use black ink or pencil, print in capital letters, and fill circles completely.

MEMBER SOCIAL SECURITY NUMBER									

Authorized Certifying Official

1. Please complete and sign Part 3.
2. If you are using WEIRS, please provide the form to whomever enters data into that database for your program. All others should mail completed forms to:

National Service Trust
 Corporation for National Service
 1201 New York Avenue, NW
 Washington, DC 20028

Part 3 Certifying Official: Please Complete and Sign

This section must be signed by an authorized certifying official. The program must designate certifying officials in writing to the Corporation for National Service.

1. Type of Enrollment

- Full-time (1700 hrs/yr)
- 1-Year part-time (900 hrs/yr)
- 2-Year part-time (450 hrs/yr)
- Summer } if Summer or Other
 } indicate length of
 } service term.
- Other }

--	--	--	--

Hours

2. Is the member enrolling in an AmeriCorps education award only position (i.e. received no cash-funded living allowance or benefits)?

- Yes
- No

3. Will the member be receiving a living allowance?

- Yes
- No

4. Date of Enrollment

Month	Day	Year			

5. Type of Program

- AmeriCorps National Direct
- AmeriCorps State
- AmeriCorps Tribe
- AmeriCorps Territory
- AmeriCorps National Civilian Community Corps
- AmeriCorps Education Awards Program
- AmeriCorps Peace Fellows
- AmeriCorps America Reads
- AmeriCorps Governor's Initiative
- Other (Specify: _____)

6. Expected Date of Completion

Month	Day	Year			

7. Program Information

Operating Site I.D. Number

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Name of Program or NCCC Campus _____

Address _____

City _____

State _____

Zip _____

Phone number _____

Signature of Certifying Official: _____ Date: _____

Name of Certifying Official (Please Print): _____

I understand that a knowingly and willful false statement on this form can be punished by a fine or imprisonment or both under Section 1001 of Title 18, U.S.C.

FORBEARANCE REQUEST FOR NATIONAL SERVICE

National Service Trust - Corporation for National and Community Service

Under the National and Community Service Trust Act of 1993, borrowers serving in approved national service positions in AmeriCorps qualify for mandatory forbearance during service (which, for FFELP loans, may be granted in increments of up to 12 months at a time). This forbearance allows borrowers to delay payments temporarily. Members may qualify if they obtained service. THIS FORM IS TO BE USED TO REQUEST THIS TYPE OF FORBEARANCE.

Mandatory forbearance for approved national service positions is available for the following educational loans: Federal Family Education Loans (Subsidized and Unsubsidized Stafford Loans, Supplemental Loans to Students (SLS), Consolidation Loans), William D. Ford Federal Direct Loans (Direct Subsidized and Unsubsidized Stafford/Parent Loans, and Direct Consolidation Loans), Federally Insured Student Loans (FISL), Health Education Assistance Loans (HEAL), Health Professions Student Loans (HPSL), Loans for Minority/Minority Students (LMS), Nursing Student Loans (NSL), and Primary Care Loans (PCL). Other forbearance/forbearance may be available for National Service Loans and loans made directly to the member by the Alaska Committee on Postsecondary Education.

During the service period, interest continues to accrue. Upon successful completion of the term of service, the National Service Trust will pay all or a portion of the interest that has accrued. If a member leaves service early for other than compelling personal circumstances, he or she will be responsible for payment of interest. If the interest is not paid, it may be capitalized. Capitalization is a process whereby unpaid interest is added to the principal amount of the loan. This increases the outstanding principal balance, and therefore, increases interest charges over the life of the loan. If a member is past due on payments not covered by the forbearance period, the loan holder may grant an administrative forbearance to resolve the delinquency at the time this request is processed and may capitalize all unpaid interest.

INSTRUCTIONS

FOR THE AMERICORPS MEMBER: Complete one of these steps for each of your service periods. After completing the Member section, you should give the form to your program director or site supervisor who will forward all requests to the National Service Trust in Washington.
FOR THE PROGRAM DIRECTOR OR SITE SUPERVISOR: Mail forms to The National Service Trust/CNCS, 1201 New York Ave., NW, Washington, DC 20005. The Trust will verify the member's participation and will forward only forms to the loan holder and loan servicer listed below.

MEMBER SECTION (Must be completed in full and signed in ink by the AmeriCorps member - please print)

Name of AmeriCorps Member:

--	--

Last

MI First

SSN:

--	--	--	--	--	--	--	--	--	--

Current Address:

City/State/Zip: _____ Phone: _____

Signature of AmeriCorps Member: _____ Date: _____

Period of National Service

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 /

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 /

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 through

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(Beginning Date) (Estimated Completion Date)

You may use one form for each loan holder you want to receive this forbearance or use one form for all loan holders. Provide the name and address of the loan holder(s) and loan servicer(s). Use the back of this form if you need additional space.

Name of Lending Institution/Loan Holder: _____ Address: _____ _____ City/State/Zip: _____ Phone: _____	Name of Lending Institution/Loan Holder: _____ Address: _____ _____ City/State/Zip: _____ Phone: _____
--	--

FOR COMPLETION BY THE CORPORATION FOR NATIONAL SERVICE

I certify that this borrower is serving in a qualified national service position for the period indicated above:

Signature of Authorized Corporation Official _____ Date: _____
 National Service Trust/CNCS, 1201 New York Avenue, N.W., Washington, D.C. 20005 Telephone No. (202) 696-5000 x347

Privacy Act Statement: In compliance with the Privacy Act of 1974, the following information is provided. The collection of this information is authorized by the provisions of the National and Community Service Act, as amended by the National and Community Service Trust Act of 1993. The primary purpose of the information is to enable an AmeriCorps member to receive forbearance on qualified student loans during a period of service. Information is for official use only, and will be provided only to identified lending institutions in order that forbearance may be granted. Your Social Security Account Number (SSN) is collected under the authority of the Internal Revenue Code (26 U.S.C. 6110(c) and 6402), for use as a taxpayer identification number. Collection is MANDATORY because the Internal Revenue Service has detached that the information reported to taxable income in the year it is used and because the holder of a student loan receives the information by the borrower's SSN. Furnishing all other information on this form is voluntary, but failure to do so may result in a denial of a payment being made from your account or it may delay a payment from your account or delay the granting of a forbearance request.

Public reporting burden for this collection of information is estimated to average 10 minutes per response, including reviewing instructions, gathering and providing the information needed to complete the form. Send comments regarding this burden or estimate of this instrument to: Corporation for National and Community Service, National Service Trust, 1201 New York Ave., NW, Washington, DC 20005. The Corporation invites the potential borrower who use to respond to this collection of information that such persons are not required to respond to the collection of information unless it displays a currently valid OMB control number on this page of the form. (Rev. 7-1-92) 1201-5002-005

(Form Number 2002-0002, Expires 2010/02)

INTEREST ACCRUED DURING NATIONAL SERVICE

National Service Trust - Corporation for National and Community Service

Upon the successful completion of a term of service, the National Service Trust will pay, on behalf of the borrower, all or a portion of the interest that accrued on a qualified student loan* during the time an education award was being earned. The loan must have been in a delinquent or delinquent status during this period. This form is to request that the loan holder provide the interest amount and send the form to the Trust for payment. Payment will be made only to the loan holder. This payment, like payments from a member's education award, is considered taxable income in the year the payment is made.

INTRODUCTION

FOR THE AMERICORPS MEMBER: Fill out the information in the Member Section. No more than 90 days prior to completion of service, send a completed and signed form to your loan holder. Your national service period runs from the date that you began your service (including any training period) to the date you completed your service. Contact your project if you do not know these dates. **FOR THE LOAN HOLDER:** Complete the Loan Holder Section and return the form to: The National Service Trust/CRS, 1204 New York Ave, NW, Washington, DC 20005

MEMBER SECTION (Must be completed in full and signed by the AmeriCorps member upon completion of service - please print)

Member's name:	Social Security Number: <input style="width: 100px;" type="text"/>
Address:	Telephone No: <input style="width: 150px;" type="text"/>
Period of National Service (Start): <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/>	through <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/>
I certify that the information above is true and correct. I authorize the release of any loan information to the National Service Trust.	
Borrower's signature: _____	Date: _____

LOAN HOLDER'S SECTION - Complete either A. or B. to indicate amount of interest

<p>A. Amount of interest accrued on member's qualified loan(s) during service period:</p> <p style="text-align: center;">\$ _____</p> <p>DO NOT INCLUDE INTEREST WHICH HAS BEEN OR WILL BE PAID BY THE US DEPT OF EDUCATION. DO NOT INCLUDE ALL OTHER PAID AND UNPAID INTEREST.</p>	OR ⇔	<p>B. Daily interest accrued \$: _____</p> <p style="text-align: center;">INDICATE ANY PERIOD OF TIME WITHIN THE SERVICE PERIOD DURING WHICH INTEREST DID NOT ACCRUE (SUCH AS A GRACE PERIOD)</p>
Name & Address of Loan Holder/Service (Where Payment Should be Sent): _____		
I certify that the amount designated is the interest that accrued on the qualified student loan(s)* during the service period indicated.		
Signature of Representative of Loan Holder/Service _____	Printed Name of Representative _____	
Representative's phone number: _____	Date: _____	

* A QUALIFYING STUDENT LOAN is 1) any loan made, insured, or guaranteed pursuant to Title IV of the Higher Education Act of 1965, as amended, other than a loan to a parent of a student pursuant to Section 408 of such Act; 2) any loan made pursuant to Title VII or VIII of the Public Health Service Act; and 3) any loan made directly to a student by the Alaska Commission on Postsecondary Education. Exclusions of these loans include Federal Family Education Loans (Subsidized and Unsubsidized Stafford Loans, Supplemental Loans to Students (SLS), Consolidation Loans), William D. Ford Federal Direct Loans (Direct Subsidized and Unsubsidized Stafford/Perk Loans, and Direct Consolidation Loans), Federally Insured Student Loans (FISL), Perkins Loans, Health Education Assistance Loans (HEAL), Health Professions Student Loans (HPSL), Loans for Disadvantaged Students (LDS), Nursing Student Loans (NSL), Primary Care Loans (PCL), and loans made directly to members by the Alaska Commission on Postsecondary Education.

Privacy Act Statement: In compliance with the 94-407 Act of 1974, the following information is provided: The collection of this information is authorized by the provisions of the National and Community Service Act, as amended by the National and Community Service Trust Act of 1995. The primary purpose of the information is to enable an AmeriCorps member to receive payments made for all or a portion of the interest that accrued while the member was serving in an AmeriCorps project. The form asks the borrower's loan holder to inform the Trust of the amount of interest that accrued in order for a payment to be made. Information is for official use only. Your credit history (and any) is collected under the authority of the National Service Code (28 U.S.C. §§ 1201 and 1202), for use as a taxpayer identification number; disclosure is MODERATELY HELPFUL for National Service Services provided that the borrower used to receive interest while you is used. Forthright of other information on this form is voluntary, but failure to do so may result in a denial of your interest being paid or being delayed by the process. Public reporting burden for this collection of information is estimated to average 10 minutes per response, including reviewing instructions, gathering and providing the information needed to complete the form. Send comments regarding this burden or cost of this instrument to: Corporation for National and Community Service, National Service Trust, 1204 New York Ave, NW, Washington, DC 20005. The Corporation invites the potential payee(s) who are to respond to this collection of information, that such persons are not required to respond to the collection of information unless it displays a currently valid OMB control number on this page of the form. (See 5 C.F.R. 1320-206-2000)

OMB Number 3045-0083, Expires 3/31/2003



CORPORATION FOR NATIONAL SERVICE EXIT FORM

This form will end the term of an AmeriCorps member in the National Trust and report on the eligibility of the Member for an education award. It will also provide the Corporation with evaluation and data.

CORPORATION
FOR NATIONAL
SERVICE

DIRECTIONS

Use black ink or pencil, print in capital letters, and fill circles completely.

MEMBER:

1. Please complete and sign Part 1.
2. Return the completed form to your Program Director. AmeriCorps VISTA members should return forms to the Corporation State Office.

Part 1 Member: Please Complete and Sign

1. Name

Last	First	MI
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2. Social Security Number

--	--	--	--	--	--	--	--	--	--

3. Mailing Address: (where the education award should be sent)

--

Number and Street

--

City

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State

--

Zip

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--

E-Mail Address

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Home Phone

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--

Business Phone

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Fax

4. Post Service Opportunities:

The Corporation for National Service would like to encourage you to stay involved in service and help connect you with educational, professional, and alumni opportunities. If you are interested in staying connected with the following organizations, please let us know.

Yes, I give the Corporation for National Service permission to release my name, address (including e-mail), and telephone number to the following types of organizations:

- Educational institutions that are interested in recruiting former AmeriCorps members or that provide special programs for former members
- Organizations offering professional development opportunities or staff positions to AmeriCorps members, AmeriCorps Alumni organizations
- Organizations that sponsor service opportunities and want to recruit AmeriCorps members.

I am particularly interested in the following issue areas (please mark all that apply):

- Education
 Public Safety
 Housing
 Environment
 Health
 Disaster Relief

No, please do not share my information with other organizations.

I certify that all of the information provided above is correct.

Member's Signature: _____ Date: _____

I understand that a knowing and willful false statement on this form can be punished by a fine or imprisonment or both under Section 1001 of Title 18, U.S.C.

Privacy Act Statement - In compliance with the Privacy Act of 1974, the following information is provided. The primary purpose of this information is to obtain from AmeriCorps program representatives their determination of whether a member successfully completed a term of service and is eligible for an education award. The evaluation information will help the Corporation improve its programming and services to members. For individuals who have indicated their desire to receive additional information on alumni organizations or special educational opportunities for alumni, members' names, addresses, and phone numbers will be shared with those organizations for that purpose. Except as indicated here, no information will be disclosed outside the Corporation without written permission. The Internal Revenue Service has determined that the education award is taxable in the year it is used. Your Social Security Number (SSN) is collected under the authority of the Internal Revenue Code (26 U.S.C. 6011(b) and 7003), for use as a taxpayer identification number. Failure to disclose the SSN or any other information may result in a denial of your receiving an education award or it may delay the processing of your education award.

OME Approval #0406 CD19 Expires 11-30-02

Living Allowance Waiver Form

I understand that, under the National and Community Service Act of 1990, as amended (42 U.S.C. § 12501 et seq.), I am eligible for a living allowance during my term of service as an AmeriCorps member. My current living allowance is \$_____, paid in monthly installments of \$_____.

I hereby waive my right to receive the full amount of my living allowance. Under this waiver, I will receive monthly payments of \$_____. This waiver is effective on the date of signature.

I understand that I may revoke this waiver at any time. I understand that if I revoke this waiver, I am not entitled to receive that portion of the living allowance that I elected to forego during the waiver period.

Name of AmeriCorps member (please print)

Signature

Date

★ The National Service Leadership Institute ★

For more up-to-date information on NSLI programs; to obtain a Request for Training Form; and to see the latest schedule of standard courses., go to www.nationalservice.org/resources/training.

MISSION

The mission of the Institute is to serve as the Corporation's leadership development resource, providing courses, workshops, and technical assistance to prepare individuals to become effective leaders of high quality programs that strengthen local communities. The Institute engages participants in examining their personal and professional attributes as well as the skills and competencies needed to lead and manage high quality national service programs and facilitate community change. Since its founding in 1995, over 6,000 individuals have participated in one of the Institute's transforming programs.

GOALS

- ★ Provide national service leaders with tools to increase program effectiveness.
- ★ Develop new leaders that strengthen and add to the diversity of the national service leadership network.
- ★ Establish a common purpose and professional identity for leaders across the national and community service movement.

WHO ATTENDS

National Service Leadership Institute programs are available to staff members affiliated with a national, state, or local organization receiving funding from the Corporation for National and Community Service.

WHAT WE DO

The Institute provides regularly scheduled courses, custom trainings, conference services, and consulting services. Program content focuses on being a more inclusive, facilitative service leader. It is derived from interviews with numerous national service staff about what it takes to be successful in leading national service organizations and partnering with others to strengthen our communities.

SAMPLE OF PROGRAM CONTENT

Creating Effective Teams: Learning how to foster high performing, inclusive work groups that have greater commitment, cooperation, communication, and problem-solving skills.

Working with Diverse Partners: Improving your ability to receive and respond to community, organizational, and personal perspectives, needs, and assets.

Fostering Collaboration: Using specific tools – such as for facilitating meetings and making group decisions – to guide groups through processes to achieve mutual goals.

Developing Self-Awareness and Valuing Diversity: Becoming aware of how your style in relating to and leading others, along with your cultural identities and assumptions, may affect your ability to work with others.

Coaching and Involving Stakeholders: Learning how to give and receive feedback, coach for higher performance, and become engaged, and engaging others in life-long learning and innovation.

TRAINING METHODOLOGIES

Institute programs provide you the opportunity to analyze your current work situation and assess key areas for leadership development. Course content is enriched by; the sharing of best practices, use of small discussion groups, personal assessment tools, learning-by-doing activities, case studies, and individual coaching. All participants receive a leadership reference workbook and time is reserved for personal reflection and networking.

REGULARLY SCHEDULED COURSES AND DATES

Fundamentals of Service Leadership

Length: 4 days

Program Overview: This four-day leadership course teaches the basics for practicing effective leadership within an organization. It is designed for those relatively new to leadership positions in national service.

How to Apply: Please go to www.nationalservice.org/resources/training, to obtain a Request for Training Form and the latest information on NSLI programs. Once you have completed your Request for Training form, please fax it to (510) 273-0160. If you have any questions, call the Institute's enrollment specialist at (510) 273-0176 or e-mail the Institute at leadership@cns.gov. Applicants are admitted on a first-come, first-served basis.

NOTE: In addition to offering this course on a national basis, the Institute partners with national direct and state entities to present it to their programs, projects, and sites. National direct or state organizations wishing to sponsor a local offering of the Fundamentals of Service Leadership course should contact the Institute.

National Service Leadership Program

Length: 5 days with a 3-day follow-up course six months later

Program Overview: This course is designed for those with several years of leadership experience within national service who want to expand their skills to become better collaborators and catalysts for community change. If you have attended other leadership or management courses, this course will provide advanced skills to complement your foundation.

How to Apply: Please, go to www.nationalservice.org/resources/training to obtain a Request for Training Form and the latest information on NSLI programs. Once you have completed your Request for Training form, please fax it to (510) 273-0160. If you have any questions, call the Institute's enrollment specialist at (510) 273-0176 or e-mail the Institute at leadership@cns.gov. Applicants are admitted on a first-come, first-served basis.

ELIGIBILITY AND COSTS

To be eligible for an Institute program, your organization must receive funding from the Corporation for National and Community Service and you must have worked in your current position for at least six months. You pay or your organization pays for your travel. Expenses such as lodging, meals, and materials are covered by other sources.

NOTE: All expenses of Corporation staff attending Institute programs must be paid by their department.

FY 2002 NSLI TRAINING SCHEDULE

Dates May Be Subject to Change Due to Site Procurements

<i>Dates</i>	<i>Training Event</i>	<i>Location</i>
November 4 - 9, 2001	NSL 28	Falmouth, MA
December 4 - 7, 2001	FSL 17	Hedgesville, WV
January 9 - 11, 2002	NSL 27 Follow-up	Soquel, CA
March 5 - 8, 2002	FSL 18	Atlantic Cluster
April 7 - 12, 2002	NSL 29	Seattle, WA
May 8 - 10, 2002	NSL 28 Follow-up	Falmouth, MA
July 14 - 19, 2002	NSL 30	Southern or Southwestern Cluster
August 27 - 30, 2002	FSL 19	North Central Cluster
November 2002	NSL 29 Follow-up	Pacific Cluster
January 2003	NSL 30 Follow-up	Southern or Southwestern Cluster

Key to abbreviations: *NSL* = National Service Leadership Program; *FSL* = Fundamentals of Service Leadership Program

OTHER INSTITUTE OFFERINGS

Customized Leadership Training

Length: 1-5 days

Create a Custom Program: Institute resources are available to support national, regional, or state-based training for national service grantees. The Institute will work with conference or training organizers to develop a program that meets the leadership training needs of the participants.

The Institute offers training modules in creating a shared vision, mission and goal setting, supervising, meeting management, group facilitation, strategic planning, change management, asset-based community mobilization, and facilitative leadership.

Program Requirements: There is a competitive application process. We encourage you to begin planning with the Institute's customized training program manager at least three months before the proposed event. For information call (510) 273-0169.

Technical Assistance and Consulting Services

As time permits, the Institute makes its senior trainers and affiliate faculty available for strategic planning, needs assessments, curriculum development, and meeting facilitation. These consulting services are extended to assist groups with specific leadership training needs. For information call (510) 273-0166 or (510) 273-0167.

State Commissions on National and Community Service

ALABAMA

Alabama State Commission on Nat'l & Community Service

Gina Bailey McKell
RSA Union Building, Suite 134
100 North Union Street
Montgomery, AL 36130-9534
Ph: 334-242-7110 Fx: 334-242-2885
Em: gbmckell@goncs.state.al.us

ALASKA

Alaska State Community Service Commission

Judith Salo
State of Alaska Dept of Ed & Early Development
333 West 4th Avenue, Suite 320
Anchorage, AK 99501-2341
Ph: 907-269-4659 Fx: 907-269-4520
Em: Judy_Salo@eed.state.ak.us

ARIZONA

Governor's Commission on Svc & Volunteerism

Stacey Gubser
Arizona Governor's Community Policy Office
1700 West Washington, Suite 101
Phoenix, AZ 85007
Ph: 602-542-1760 Fx: 602-542-3520
Em: sgubser@az.gov

ARKANSAS

Arkansas Commission on Nat'l & Community Svc

Albert Schneider
700 S. Main Street
P.O. Box 1437, Slot S230
Little Rock, AR 72203-1437
Ph: 501-682-6724 Fx: 501-682-1623
Em: al.schneider@mail.state.ar.us

CALIFORNIA

California Governor's Office on Svc. & Volunteerism

Chuck Supple
1110 K Street, Suite 210
Sacramento, CA 95814
Ph: 916-323-7646 Fx: 916-323-3227
Em: chuck.supple@goserv.ca.gov

COLORADO

Colorado Gov's Commission on Nat'l & Community Service

Gregory Geissler
1391 North Speer Blvd, Suite 600
Denver, CO 80204-2554
Ph: 303-595-1541 Fx: 702-904-9738
Em: greg.geissler@cccs.ccooes.edu

CONNECTICUT

Connecticut Commission on Nat'l & Community Service

Jacqueline Johnson
Department of Higher Education
61 Woodland Street
Hartford, CT 06105
Ph: 860-947-1827 Fx: 860-947-1310
Em: jjohnson@ctdhe.org

DELAWARE

Delaware Community Service Commission

Jarvis Berry
Charles Debnam Bldg. Herman Holloway Cam.
1901 North Dupont Highway
New Castle, DE 19720
Ph: 302-577-4965 x229 Fx: 302-577-4972
Em: jaberry@state.de.us

DISTRICT OF COLUMBIA

District of Columbia Commission on Nat'l & Community Svc

Deborah Gist
One Judiciary Square, Suite 920 S
441 - 4th Street, NW
Washington, DC 20001
Ph: 202-727-7943 Fx: 202-727-6895
Em: deborah.gist@dc.gov

FLORIDA

Volunteer Florida!

Fred Sanguiliano
444 Appleyard Drive
Tallahassee, FL 32308-2895
Ph: 850-921-5172 Fx: 850-921-5146
Em: fred@fccs.org

GEORGIA

Georgia Commission for Service and Volunteerism

James Marshall
Georgia DCA
60 Executive Park South, NE
Atlanta, GA 30329
Ph: 404-327-6844 Fx: 404-327-6848
Em: jmarshall@dca.state.ga.us

HAWAII

Hawaii Commission on Nat'l and Comm Service

Isaac Watson
Office of Community Services
830 Punchbowl Street, Room 420
Honolulu, HI 96813
Ph: 808-586-8675 Fx: 808-586-8685
Em: hicncs@pixi.com

IDAHO

Idaho Commission for National and Community Service

Kelly Houston
1299 North Orchard Street
Suite 110
Boise, ID 83706
Ph: 208-658-2000 Fx: 208-327-7444
Em: khouston@corr.state.id.us

ILLINOIS

Illinois Commission on Volunteerism & Community Svc

Asta Ardickas Bonheyo
Illinois Dept of Human Services
623 E. Adams, 1st Floor
Springfield, IL 62794
Ph: 217-558-2663 Fx: 217-558-2678
Em: dhshp68@dhs.state.il.us

INDIANA

Indiana Gov's Commission on Community Svc & Volunteerism

Joseph Smith
302 West Washington Street, Rm E220
Indianapolis, IN 46204
Ph: 317-233-0900 Fx: 317-233-5660
Em: jlsmith@dwd.state.in.us

IOWA

Iowa Commission on Volunteer Svc

Michael Milligan
Governor's Office/State Capitol
200 East Grand Avenue
Des Moines, IA 50309
Ph: 515-281-0161 Fx: 515-281-6611
Em: mike.milligan@igov.state.ia.us

KANSAS

Kansas Commission on Nat'l and Community Svc

Patricia Kells
120 SE 10th Avenue
Topeka, KS 66612
Ph: 785-368-6207 Fx: 785-368-6284
Em: pkells@ksde.org

KENTUCKY

Kentucky Comm on Community Vol & Svc

Eileen Cackowski
275 East Main Street - Mail Stop 3W-C
Frankfort, KY 40621
Ph: 502-564-7420 Fx: 502-564-7478
Em: kccvs@mail.state.ky.us

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National Health Corps

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HUMANITY INTERNATIONAL, INC.**

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(UNTIL 1-02)**

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JUMPSTART FOR CHILDREN, INC

Jumpstart for Young Children

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National Collaboration for Homeless Veterans

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