



Public Allies Site Monitoring Tool

Public Allies Site Monitoring Tool is designed to support Public Allies management of the high-quality, exceptional programming for which Public Allies has become known. For use by both site and national staff, the tool consists of national baseline and performance standards and AmeriCorps reporting requirements. The purpose of this tool is to enable Public Allies to manage and monitor baseline implementation and ongoing performance. This data, when combined with annual evaluation results, provides an overall picture of the key activities engaged in by Public Allies, and the outcomes achieved as a result of those activities. The tool contains six sections:

- I- Placements and Partner Organizations
- II- Recruitment, Selection, Matching and Enrollment
- III- Alumni Programming
- IV- Ally Health and Well-Being
- V- Training and Learning
- VI- Team Service Projects

Revised in 2004-2005, the site monitoring process hopes to streamline data collection, minimize time spent on reporting efforts and site visits, and ensure up-to-date and accurate information. The process includes a self-assessment related to both Public Allies standards and information required for our AmeriCorps reports. Each site needs to complete the self-assessment part of the tool by February 17, 2006.

We estimate that on average, each section will take no more than 30 minutes to complete. You can divide up the responsibility for sections to appropriate site staff as necessary, though we ask you to keep the document intact and enter information in the format and space provided. While this may seem like more work right now, in the long run it will save us all time – by not having to separately respond to a mid-year AmeriCorps Progress Report, and by not having to spend so much time during a Regional Director site visit answering basic questions!

Timeline

<u>Week of January 9th:</u>	Self assessment tool sent to sites.
<u>February 17th:</u>	Final Draft of site self-assessments due to your Regional Director
<u>March – June:</u>	Site visits take place
<u>By July 30th:</u>	Follow up completed on action plans created during site visit

The template for this document is located under [X:\Site Monitoring Tool\ Site Monitoring Tool 2005-2006 Template](#). Please use 'save as' to create a document you can modify for your site, and either place it under X:\ or send it via email to your Regional Director. The document will also be posted to the "Site Management Docs" section of the Outlook Public Folders.

This is just the second time that we are using this format and process, so there may be a few bumps in the road. Please bear with us, and thank you for your support in this endeavor. Please contact your Regional Director if you have questions.

SECTION I-A: PLACEMENTS AND PARTNER ORGANIZATIONS CHECKLIST

(Please complete the following checklist.)

	Yes	No	Number	Comments
1. All partner organizations are non-profit organizations, foundations, schools or public agencies:				
2. The number of current partner organizations that have hosted Allies before:				
3. The number of current partner organizations currently employing Public Allies alumni:				
4. The amount of money partner organizations contribute toward each Ally's stipend, taxes, etc.:				
5. The number of partner organizations currently hosting at least one Ally:				
6. The number of current partner organizations that are faith-based organizations:				
7. Partner organization supervisor orientation included an outcomes training related to Ally position description finalization:				
8. All partner organizations supervisors attended a Public Allies hosted supervisor orientation session:				
9. The number of partner organization supervisors who attended a Public Allies hosted supervisor orientation session:				
10. The number of partner organization supervisors who did not attend a Public Allies hosted supervisor orientation session:				
11. The number of partner organization supervisors who have not been oriented to Public Allies:				
12. The number of service days held to date this program year:				
13. 3-way meetings are regularly occurring between all partner organization supervisors, Program Managers and Allies:				
14. The number of rounds of 3-way meetings that have occurred with partner organization supervisors, Program Managers and Allies:				
15. YTD PISD reports have been reviewed with all partner organization supervisors, signed and filed in Ally files:				
16. The number of PO supervisors that have not yet reviewed YTD reports with their Ally and Program Managers during a 3way meeting:				
17. The number of supervisor focus groups or other supervisor convenings held or planning to be held				

this year:				
18. The number of Allies with volunteer recruitment and/or management responsibilities at their partner organizations:				
19. Do Allies and partner organizations understand Public Allies' expectations for recruiting volunteers and tracking their activities?				
20. The number of volunteers recruited to date:				
21. The number of people served by volunteers:				

SECTION I-B: PLACEMENTS AND PARTNER ORGANIZATIONS DOCUMENT PROVISION

(Please email the following documents to your Regional Director.)

1. Please provide electronic copies of the following documents:
 - This year's Partner Organization Orientation Agenda/s
 - A Sample Partner Organization Correspondence
 - This year's Partner Organization Focus Group Agenda and Results (If Applicable)

SECTION I-C: PLACEMENTS AND PARTNER ORGANIZATIONS NARRATIVE QUESTIONS

(Please provide narrative responses to the questions below.)

1. How closely do the activities outlined in Allies' position descriptions reflect what the Ally is actually doing?
2. What percentage of Ally objectives are likely to be met? Exceeded? Not met?
3. What percentage of ally outcome performance standards are likely to be met? Exceeded? Not met?
4. Please provide two edited, narrative examples of collaborations, along with the "linkage levels," that have been developed by Allies at your site so far this year. The narratives should provide the name of the Ally, their placement, the name of the "linkage" organization, the level of the linkage, a brief description of the collaborative effort and how the placement organization and community will benefit from the linkage developed.
5. Please provide one narrative example (one paragraph long) that describes a volunteer recruitment/management/training "success story" had by an Ally. Give us a good example of Public Allies ability to successfully engage volunteers.
6. Please provide a total of two to four "success stories" from your site. Some of the more powerful stories are those that illustrate a program participant that was served by an Ally and the "change" they underwent as a result of the Ally's service to them.
7. Provide a very brief description of how you oriented, trained or provided technical assistance to your Partner Organization supervisors this year (from both a "quality" and "quantity" standpoint). If available, provide any information about Supervisors that attended Friday trainings or other Public Allies learning opportunities.

8. If you have any Allies working explicitly with or on issues pertaining to the LGBTQ community, briefly tell us where they serve and what they do.
9. What have been your biggest successes this year?
10. What have been your biggest challenges this year?
11. If you've thought about your plans for next year, please describe them briefly.
12. What types of support might you need in order to do your best work in this area?

SECTION I-D: PLACEMENTS AND PARTNER ORGANIZATIONS SITE VISIT INTERVIEW QUESTIONS

(To be discussed during an upcoming site visit with your Regional Director.)

1. Are you satisfied with the diversity of current POs?
2. Are supervisors on time and clear with their PISD responsibilities?
3. How did you work with POs to finalize Ally position descriptions?
4. How are Supervisors invited to participate in other parts of the PA program? How often do PO supervisors participate in or lead Ally trainings? Service Days? PA Events?
5. How are PO supervisors informed about their role in Ally Continuous Learning, especially the 360?
6. In addition to the CLT tools and processes, how do you continually monitor and support Ally progress and intervene when support is necessary?
7. How do you document your discussion with partner organizations? When do you bring placement issues to the Executive Director?
8. Do you have ideas or plans for ways that POs can better benefit from joining the Public Allies network?
9. Based on this conversation, what steps will you take in order to meet the performance goals and AC requirements for placements and build the PA Alliance? What will you change/what successes will you build on now? In coming years? How can other sites and PANO support you in this area?

SECTION II-A: RECRUITMENT, SELECTION, MATCHING AND ENROLLMENT

(Please complete the following checklist.)

Yes No Number Comments

1. The number of Ally applications received for this program year:				
2. The number of partner organization applications received for this program year:				
3. The number of Allies that have been enrolled to date:				
4. Were all Allies matched by Core Training?				
5. The number of Allies existing as part of the national direct grant:				
6. The number of Allies existing as part of a state commission grant:				
7. Demographically, the Ally class does a good job of representing the Ally community.				
8. The number of Allies that come from the local community:				
9. The number of Allies who have a college degree, or some higher education experience:				
10. Background checks have been completed for each Ally serving:				
11. Complete Ally Application exists in member files				
12. Proof of education status exists in member files:				
13. Documentation of U.S. citizenship or alien resident status exists in member files:				
14: Completed AmeriCorps Enrollment Form exists in member files:				
15: Public Allies acceptance letter exists in member files:				
16: Member contracts exist in member files:				
17: Documentation of completed criminal background check exists in member files:				
18: Documentation of health care enrollment, or waiver exists in member files:				
19: Where applicable, loan forbearance documentation exists in member files:				
20: Documentation from IDP meetings exists in member files:				

21: Documentation from 3way meetings, including signed YTD reports exists in member files:				
22: Where applicable, documentation of disciplinary action taken (verbal warnings, written warnings, probationary agreements, suspensions, releases) exists in member files.				
23. The number of brand new partner organizations that received a site visit prior to having an Ally placed at their organization:				

SECTION II-B: RECRUITMENT, SELECTION, MATCHING AND ENROLLMENT NARRATIVE QUESTIONS

(Please provide narrative responses to the questions below.)

1. What recruitment strategies and tactics were used this program year?
2. Briefly, what process do you use to select Allies? (Application reading, panel interviews, group inter views, etc.)
3. Who comprises the panels in your panel interviews?
4. How are group interviews facilitated?
5. How were partner organizations selected this year?
6. How and when were criminal background checks completed?
7. What have been your biggest successes with recruitment this year?
8. What have been your biggest challenges with recruitment this year?
9. What types of support might you need in order to do your best work in this area?

SECTION II-C: PLACEMENTS AND PARTNER ORGANIZATIONS SITE VISIT INTERVIEW QUESTIONS

(To be discussed during an upcoming site visit with your Regional Director.)

1. What takes place when incidences in an Allies' criminal background arise?
2. Have recruitment strategies and tactics been effective? Have any changes in strategy or tactic been made, in relation to past efforts?
3. What is being planned or thought about for the upcoming recruitment season?
4. Describe the matching process you used this year.

SECTION III-A: ALUMNI PROGRAMMING SITE VISIT INTERVIEW QUESTIONS

(To be discussed during an upcoming site visit with your Regional Director.)

1. How well do you think Public Allies is engaging its Alumni base right now?
2. What activities are taking place in order to do so?
3. What plans are in place to do so in the future?
4. What plans are in place to continue to build capacity to support Alumni programming?
5. What support do you need in order to do your best work in this area?

SECTION IV-A: ALLY HEALTH AND WELL-BEING CHECKLIST

(Please complete the following checklist.)

	Yes	No	Number	Comments
1. All AmeriCorps slots have been filled:				
2. The number of Allies that have been released from the program:				
3. The number of Allies currently on probation, or suspension:				
4. All Allies were offered stipends, child care and health insurance:				
5. The Ally stipend amount:				
6. The amount of money partner organizations contribute to Ally stipend:				
7. Allies have the same program manager as their IDP coach, the TSP coach and liaison to their partner organization:				
8. Allies are participating in IDP meetings once per month:				
9. The number of Allies who identify themselves as LGBTQ:				

SECTION IV-B: ALLY HEALTH AND WELL-BEING NARRATIVE QUESTIONS

(Please provide narrative responses to the questions below.)

1. What have been the reasons for releases or disciplinary actions taken with Allies this year?

SECTION IV-C: ALLY HEALTH AND WELL-BEING SITE VISIT INTERVIEW QUESTIONS

(To be discussed during an upcoming site visit with your Regional Director.)

1. Have you referred Allies to counseling, tutoring, outplacement or other human service opportunities this year? If so, do you have a broad network for their personal & professional development?
2. In addition to 3-ways and Focus Groups, discuss how you maintain your process for maintaining regular communication about Allies and their well being with PO Supervisors, mentors and others.
3. What is your process for early detection and intervention with those Allies having troubles (professionally and/or personally) that may prevent them from successfully completing the program?

4. What is your process for terminating an Ally from the program?
5. How is the Executive Director involved in the management of personal & professional troubles and conflicts with Allies?
6. What have you learned from Ally dismissals; are there similarities or trends?
7. How are other continuous learning processes, such as 360s, POLs, portfolios incorporated into coaching sessions? What are your methods of enrolling Allies into the coaching process? How would you classify your coaching style? How do you hold Allies accountable for the goals they set for themselves?
8. What is your method for creating outplacement opportunities and plans for the Allies? How will Allies be introduced to the Lifetime Leadership Initiative and be encouraged to participate in Life After Public Allies? What are your plans for graduation? Are there any circumstances under which an Ally could graduate if they had not achieved all the requirements?
9. Based on this conversation, what steps will you take in order to meet national Ally well-being performance goals and create the best support for Allies? What will you change/what successes will you build on now? In coming years? How can other sites and PANO support you in this area?

SECTION V-A: TRAINING AND LEARNING PROGRAM

(Please complete the following checklist.)

	Yes	No	Number	Comments
1. At least 3 months of trainings were set up prior to the start of the program:				
2. The number of trainings facilitated by alumni:				
4. The number of trainings facilitated by partner organization supervisors:				
5. The number of trainings facilitated by Public Allies staff:				
6. Ally retreats are jointly held with other sites:				
7. Allies evaluate each training session:				
8. Check-ins, breaks, debriefs and closing are all parts of the training day:				
9. Program staff attend all training sessions:				
10. Trainings that address LGBTQ concerns have been provided:				
12. Trainings pertaining to civic engagement have been provided:				

SECTION V-B: TRAINING AND LEARNING PROGRAM DOCUMENT PROVISION

(Please email the following documents to your Regional Director.)

1. Please provide electronic copies of the following documents:
 - Agenda for Core Retreat
 - Agenda for Core Training
 - This year's Training Calendar
 - Samples of Trainings- Lesson Plans

SECTION V-C: TRAINING AND LEARNING NARRATIVE QUESTIONS

(Please provide narrative responses to the questions below.)

1. What have been your biggest successes this year? Our Biggest success this year has been consolidating the Training calendar into four categories: Community development, Personal Growth, Civic participation, and Fundamentals of Non Profit.

2. What have been your greatest challenges? The biggest challenge has been balancing all the different training requirements with the needs of the class.
3. What types of support might you need in order to your best possible work in this area? Not sure

SECTION V-D: TRAINING AND LEARNING SITE VISIT INTERVIEW QUESTIONS

(To be discussed during an upcoming site visit with your Regional Director.)

1. How do you link trainings to program outcomes? To placements? To TSPs? Are there curriculum areas that you are not currently able to address adequately?
2. What do you consider the most successful trainings this year? What trainings or trainers will you change in the future?
3. How do you prepare trainers for working with the Allies? Under what circumstances are Allies invited to participate in the planning and facilitation of trainings? Are most trainings experiential and interactive?
4. Did core training include a ropes course or wilderness experience? Discuss your planning process for each retreat, and who participates. How do you believe your retreats contribute to successful Ally teamwork and performance?
5. How do you structure critical reflection? How does critical reflection add to the Ally learning experience?
6. Based on this conversation, what steps will you take in order to meet national Training and Learning performance goals and create the best learning experiences for Allies? What will you change? What successes will you build on now? In coming years? How can other sites and PANO support you in this area?

SECTION VI-A: TEAM SERVICE PROJECTS

(Please complete the following checklist.)

	Yes	No	Number	Comments
1. The number of Team Service Projects being implemented this program year:				
2. The number of Allies on each TSP team:				
3. The number of hours Allies are given each week to work on their Team Service Projects:				
4. Allies have a clear idea of what an outcome is and how to apply one to their project:				
5. There is a PISD report completed or to be completed with clear objectives and measurable outcomes:				
6. TSP coaches attend TSP meetings during give program TSP time:				

SECTION VI-B: TEAM SERVICE PROJECTS NARRATIVE QUESTIONS

(Please email the following documents to your Regional Director.)

1. Please provide synopses of each of your Team Service Projects implemented this year. What are their aims? Your synopsis should include (1) a description of the project. (2) the outcomes we hope to achieve, and (3) the estimated number of people served by the project.
2. What have been your greatest successes with TSP this year?
3. What have been your greatest challenges?
4. What type of support might you need in order to do your best work in this area?

SECTION VI-C: TEAM SERVICE PROJECT SITE VISIT INTERVIEW QUESTIONS

(To be discussed during an upcoming site visit with your Regional Director.)

1. Are projects direct service or do they build the capacity of a partnering nonprofit or the community? Is there a team of advisors or other committed community partners involved in the project with a specific staff liaison to the organization to promote effectiveness of the project? How do your projects reflect our value of community participation? Discuss how the TSP's are managed.
2. How do you clarify and manage the coach vs. facilitator role with your teams? How do you ensure that Allies drive the project and team process? What about TSPs are meant to be different as a result of staff presence?

3. Based on this conversation, what steps will you take in order to meet national TSP performance goals, create the best learning experiences for Allies and the most positive impact on community? What will you change? What successes will you build on now? In coming years?