

Site Partnerships

- Ensure each service site plans an orientation for members.

One week before start of the year:

- Meet with members and site supervisors to set goals and ease the start-up process.

First month of program year:

- Obtain feedback from sites through written evaluations or monthly meetings.
- Monitor sites through regular site visits and meetings with key staff.
- Share program successes with partners.

Ongoing during the year:

Recruitment

- Send welcome letter to new members.

- Finalize orientation logistics.
- Rehearse trainings.
- Hold prospective member social event.

- Hold member orientation.
- Help members to get bearings for qualified loans.
- Plan ongoing development: set dates for regular team meetings, trainings, service projects, celebration, and reflection.

- Continue outreach and recruitment efforts.
- Continue selection process.
- Survey members on training needs.
- Conduct mid-year and end-of-year performance evaluations.
- Meet monthly with members individually and as a team.
- Arrange for post-service planning, such as résumé writing or job shadows.

Do you remember your first weeks in the national service field? The learning curve is steepest when it matters most. Getting started demands a high level of organization, effort and knowledge, especially at the program level. Unfortunately, many national service programs and new program directors struggle through their first year.

To ensure a high level of effectiveness right from the start, 100 new program directors prepared the ultimate program start-up blueprint. At the Atlantic Cluster New Program Directors Orientation (September 6-8, 2000, in Linthicum, Maryland) these intrepid program directors met in small groups to identify the tasks needed to be effective in each phase of a start-up. The groups merged their efforts

Member Development

- Monitor member files to see what still needs to be turned in.

- Enter members into WBRS.
- Set up schedule of due dates for reports (both fiscal and program).
- Implement evaluation mechanism.

- Enter member hours into WBRS.
- Keep members informed of hours.
- Timely submission of reports (both fiscal and program).
- Prepare and submit exit paperwork.

Policies and Procedures

- Enroll members in health care plan.
- Enroll eligible members in AmeriCorps* CARE.

- Set up schedule of due dates for reports (both fiscal and program).
- Set up format and times for meeting to review budgets versus actual expenditures.

- Regular monitoring of budget versus actual expenditures.
- Monitoring of match in budget versus actual reported.
- Timely submission of reports (both fiscal and program).

Budget/Fiscal

into one document, which others in the field have enhanced with their ideas and contributions. The above blueprint and checklist is the result. Pull it out of the newsletter and post it on the wall. Make copies and pass it out at your next New Program Directors Meeting. Ask for contributions, make changes, and send it back to us.

One word of caution to new programs and new staff: This is not the only way to get started, nor is it likely any one program will be able to accomplish everything on this list. While timelines in national service tend to be short, there is no substitute for long-term planning and preparation to make things work smoothly. Where possible, prepare for a start-up long before the three-month window presented here.

Start-Up Challenge: Recruitment for the Young Fathers Project

By Laine Renfro Sedillo, Executive Director, New Mexico Teen Pregnancy Coalition

The New Mexico Young Fathers Project began in 1999, with funding from the Office of Population Affairs and its collaborative partners: Planned Parenthood of New Mexico and the Father & Family Center. The program received funding to develop and provide a multifaceted educational program to address the needs of young parenting males at 10 teen parent sites across the state. One of the biggest start-up challenges was recruitment of AmeriCorps members. Through the process of recruitment, program staff learned some valuable lessons:

■ **Position descriptions help you recruit the “right” members.** In the New Mexico Young Fathers Project, members needed to be male with at least two years of college, experience in health education or social work, and experience in male involvement activities (such as Boy Scouts). Without a clear position description, you can waste a lot of energy recruiting members who are not qualified for your program. A comprehensive position description is essential to help you focus your recruiting efforts.

■ **Recruiting is best done locally.** Although websites and e-mail discussion groups can be good places to advertise for interns, most recruitment involves the local media and traditional “low tech” ways of networking within the community. Start with local colleges and vocational schools or other places where the types of members you are looking for might be found. Also, use other AmeriCorps members to help get the word out about your project. Personal recruitment seems to work well.

■ **Network with other AmeriCorps sites on a coordinated recruitment strategy.** If several programs in your area are recruiting members, share position descriptions and member applications. A member not suited for one placement may be perfect for another.

■ **Be prepared for lots of paperwork.** Even though some of it is computerized, there are lots of documents to read, forms to complete, and reports to submit.

■ **Once you find members, invest heavily in them.** Members are in it not for the money but for the experience and sense of purpose they gain. Start the members off right with a well-

designed pre-service orientation that builds the ethic of service, unifies the team, and gives them the knowledge they need to begin service. Setting clear expectations in the beginning will reduce confusion and misunderstandings later in the year. After pre-service orientation, train your members thoroughly and often, since they have a lot of desire, but not as much technical expertise as you might expect.

■ **Seek to learn about the skills members already have.** Members may possess skills and knowledge that you do not know about. Try to build upon the unanticipated skills of members in ways that strengthen the program efforts.

■ **Don’t let the small stuff get you down.** Recruiting is hard work, and there is no way around the time and effort it takes to recruit good members. But if the details of recruitment start to get you down, take some time to remember the big picture: careful recruiting will ultimately increase the success of your program. ■

For more information, contact Laine Renfro Sedillo at nmtpc@flash.net or Carl Dellinger, Planned Parenthood of New Mexico, at dellinger@aol.com.

Building a Strong Peer Network

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Give back to your network. A final principle: Always give back to your network. As you gain experience, you will have more experience to share, and in a couple of years you will no longer be the “new kid” on the block. Then, it will be your turn to provide support when a new director says, “Help, I don’t know anything! Where can I turn?”

There are two approaches when starting out as a new director. The first is to go it alone, struggle to find resources, and when things go wrong, blame it on lack of preparation or proper training. The second approach is to intentionally develop and nurture professional relationships, ask for help, and, whenever possible, establish more formal mentoring relationships. Though we may still struggle at times, this second approach will give us a broader network for support, because we are all in this work together. ■

Financial Management for New Programs

By Corland Forrester, CPA, Walker & Company

We all know the proverbs “A stitch in time saves nine” and “If something is worth doing, it’s worth doing right the first time.” These two adages should be held closely by program directors and other stakeholders of new programs as they begin the process of setting up their operations. “Doing it right” means implementing strong financial controls to accurately manage a program’s operations. A program may have a good mission and a great plan for carrying it out, but the program can fail if good financial management is lacking. As you begin to develop your program’s financial management system, consider the following essential activities for the start-up and operation of a successful program.

Start-Up Activities

1. Know the rules you must follow while administering your grant. These rules may include the Corporation’s grant provisions that apply to your specific grant, state guidelines for the location(s) of your operations (which may be obtained from your state commission or office), and federal guidelines based on your type of organization. The federal regulations are found in the Office of Management and Budget (OMB) Circulars. OMB circulars that may apply to your organization (see sidebar) can be found at www.whitehouse.gov/OMB/circulars/index.html.

2. Design internal controls to manage your operations. These controls should include procedures for the following:

- Approving program expenditures
- Ensuring all expenditures are recorded in the financial records
- Reviewing and approving timesheets of members and staff, as appropriate
- Preparing financial and programmatic reports
- Segregating activities performed by employees to develop a system of checks and balances (for example, make sure the same employee does not open the mail, deposit checks and record the transactions in the financial system)

3. Document through written policies and procedures the internal controls that are designed to manage your operations.

4. Design your accounting system with separate cost centers to segregate the activities for:

- Grant expenditures that are reimbursed by the Corporation for National Service
- Matching expenditures, if applicable
- Other non-federal-related expenditures

5. Take a careful look at the financial capacity of your organization to provide cash (for members’ support) and other operating matches, which can be cash or in-kind support.

Operating Activities

1. Set up a payroll process for members and staff. Ensure that applicable taxes are withheld from members’ living allowances, if applicable.

2. Review program goals against your budget and compare to actual expenditures.

3. Prepare Periodic Expense Reports (PER) and Financial Status Reports (FSR) in a timely manner.

4. Ensure that policies and procedures are being followed.

5. Ensure that the program expenditures are being approved by the appropriate person and that these expenditures are reported accurately.

6. Ensure that the matching requirements are being met. Member support match should be met every quarter and operating match by the end of the program year.

7. Document your expenditures so that (1) they can be easily traced to the source documentation; and (2) it is clearly indicated how these expenditures were necessary for your program’s operation.

History has taught us that when programs fail to implement strong financial management controls, they invite intentional or unintentional fiscal problems that can result in a program losing funds. The lack of financial controls can also result in negative audit findings. This can require an organization to pay back funds to the federal government or risk not having the program renewed. If you implement good fiscal controls early in your program’s life, you won’t have to deal with the negative consequences of not having them later on. ■

For technical assistance with financial management, contact Corland Forrester toll-free at 1-877-363-9300 or ceforrester@walkerllp.com.

Relevant OMB Circulars

State and Local Government, Tribes:

A-102
A-87
A-133

Higher Education:

A-110
A-21
A-133

Nonprofit:

A-110
A-122
A-133

Library Spotlight: Program Start-Ups

Corporation for National Service programs may check out these and other items from our Library Catalog by contacting Bernadette Perez:

Phone:
800-860-2684, ext.260

TDD:
831-461-0205

Fax:
831-430-9471

Website:
www.etr.org/nsrc/library.html

Address:
NSRC/ETR Associates
P.O. Box 1830
Santa Cruz, CA
95061-1830

Opinions or points of view expressed in this newsletter or in these referenced items are those of the authors and do not necessarily reflect the official position of the Corporation for National Service or ETR Associates.

America Reads: Principles and Key Components for High Quality America Reads National Service Program Initiatives

Corporation for National Service, 1997
8 pages,R0688
Describes guidelines for integrating America Reads initiatives into national service programs and the standards of quality tutoring activities.

AmeriCorps Education Awards Programs: Starting Strong and Staying on Track

Catholic Network of Volunteer Service
Approximately 150 pages,R1636
Sections on CNS requirements, start-up tips, member recruitment and orientation, site supervisor resources, program monitoring, site management, and training and technical assistance.

AmeriCorps*VISTA Supervisor's Manual

92 pages,R0730
Assists supervisors with issues like project development,member recruitment,project implementation,and member administration.

Becoming a Better Senior Corps Supervisor

National Crime Prevention Council
120 pages,R1457
Gives supervisors techniques for active listening, coaching, and managing conflict. Describes self-assessment and time-management methods.

Becoming a Better Supervisor: A Resource Guide for Community Service Supervisors

143 pages,C0096
Illustrates the many roles of a supervisor; includes readings, assessment tools, and checklists.

Complete Guide to Learning through Community Service: Grades K-9

Lillian S. Stephens
235 pages,C0111
How to establish a service-learning program: integrating curriculum according to age, course of study, and planned duration.

Essential Elements of Service-Learning for Effective Practice and Organizational Support

National Service-Learning Cooperative
34 pages,M0791
Includes an introduction to service-learning, a description of the essential elements of effective service-learning practices and how to apply them.

Getting Things Started: The AmeriCorps Orientation Video

8 minutes,V0156
Overview of AmeriCorps for those beginning their year of service. Describes the mission of AmeriCorps, the history of national service, and what it means to be an AmeriCorps member.

1995-6 Idaho TRIO AmeriCorps Member Calendar-Journal

150 pages,W0035
Helps members record, focus, and organize their goals and work for the next year. Each month contains a calendar with time-card deadlines. Space for weekly journal entries for recording work and for writing success stories is provided.

Practical Applications: Strategies for Supporting a Diverse Corps

38 pages,R0685
Strategies for encouraging and promoting diversity in AmeriCorps programs. Addresses recruitment and retention of members, assessment policies, training and skill development, and dealing with group conflicts.

Programming for Impact National Toolkit

Angela Roberts,ed.
Approximately 200 pages,K0565
Reference manual, learning tool, and guide for Senior Corps project directors. Sections include project administration, working with volunteer stations,advisory councils,and tools for community needs,data collection,and measurement.

Seniors for Schools Effective Practices Guidebook

National Senior Service Corps
350 pages,R1453
How to initiate and sustain a senior service literacy program in schools: recruiting and training volunteers, building partnerships, choosing a literacy model, community outreach, and program administration and evaluation.

Starting Strong: A Guide to Pre-Service Training

MOSAICA, Washington, D.C.1996
595 pages,R0135
Provides information on what type of pre-service training is appropriate for specific programs. Also available at www.etr.org/nsrc/pdfs/startingstrong/starting.html. Disk of activities can be ordered at no charge from NSRC.*

Literacy Projects: Start-Up Issues and Concerns

Note: The following is an excerpt from the *Seniors for Schools Effective Practices Guidebook*, Chapter One, “Common Start-Up Issues and Concerns.” For more information on establishing a literacy program, refer to the guidebook (available from the NSRC lending library, page 10).

As project directors, there are many factors to be considered when establishing a literacy program. This article highlights common concerns and problem areas identified by Seniors for Schools project directors themselves. It offers you a starting point for finding your own approach and solutions.

Beginning a New Literacy Initiative

As a new project director, you may feel overwhelmed with the task set before you and have some hesitancy in knowing how and where to begin. Do not hesitate to seek help as you launch a new initiative, or continue to develop an existing program. You have many resources for information and problem-solving, beginning with the Corporation for National Service in Washington, D.C. Consult your sponsor organization and school partners as well. Keep them abreast of issues and activities. The more you involve others in your project, the broader your foundation for the project will be. Seek advice and assistance as often as you need it.

Administering a Grant Authored by Someone Else

Frequently the author of your program’s grant is a writer, not a project director or manager. The author may have identified key goals, objectives and implementation procedures that you have not had a role in designing. It is okay and often necessary to tweak goals and objectives to fit a more realistic and manageable timeline and milestones for your project. You may amend the written goals and objectives based on your knowledge of your program and goals.

Securing Staff to Administer the Project

When projects are selected, there must be qualified people available to do everything from helping answer the phones when recruitment calls begin to come in, to assisting with financial matters regarding the new grant. Thus, project directors often must move quickly to secure new staff that can help administer the project.

Expect an adjustment period for organizing any new project, but plan for staffing early in your preparations. Your sponsor agency may have staff who are able to help you out. Ask advice from your sponsor. They are already established in the community and will be a valuable resource for information and ideas for getting things done. They also fund your program and will be able to identify what the budget resources are for hiring support staff.

How to Communicate Your Project’s Needs to a School Principal

When a project is new and lacks a track record, project directors can sometimes feel reluctant and uncomfortable being up-front and direct when identifying project needs and expectations for the school’s role. Develop a partnership agreement or Memorandum of Understanding with each school. (Samples are available at the LEARNS website: www.nwrel.org/learns.) Outline what will be provided by your project, and by the school. Also establish a timeline for meeting obligations and benchmarks for measuring the success of the partnership. This will provide a shared understanding of expectations.

How Much Time and What Topics Are Essential to Volunteer Orientation and Training?

There are so many things that project directors feel are important for volunteers to know and understand about their work. This is increasingly true for projects working in literacy and education.

Recognize first of all that your project is unique. There will be similarities in projects, but no two projects are exactly the same, nor are their needs the same. Look to other projects for examples, survey your volunteers and find out what knowledge they feel they’re lacking and look to your partner schools to be resources as well. Schools using particular reading models or approaches will most likely want to provide some sort of training to volunteers. Create a training outline or training plan for the year.

Remember, not every topic can be covered during the initial orientation period. Build in trainings throughout the year, and make these trainings relevant to the needs of the children, volunteers and overall project goals.

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alternative formats for
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Starting Smart in Service-Learning

By Bob Seidel, Department of Service-Learning, Corporation for National Service

Many of the ideas about start-up in AmeriCorps and Senior Corps also apply to Learn and Serve America programs. There are, however, a few key points that are essential, if not specific, to service-learning programs:

- Make sure that your goals and objectives address adequately both participant learning outcomes and community service outcomes. It's crucial that your program find ways to make these categories of objectives mutually supportive rather than competitive.
- Involve diverse participants in defining goals, objectives, and methods as early as possible. Students, faculty, administrators, and other community members who have a stake in what the program does should all have meaningful representation as early as is practical.
- Work on program evaluation from Day One. Your concern for long-term success of your program, as well as meaningful outcomes for all stakeholders, should mean that you integrate process evaluation and outcomes assessment into your initial work on goals and objectives. If this is not an area of expertise for you, seek assistance from appropriate training and technical assistance providers.

There are important reasons for, and multiple facets to, all three of these points. Addressed well, they can empower participants, make service as appropriate and meaningful as possible, help focus on similarities and differences among participants and other community members, and stimulate creativity and energy.

Throughout the program activity, participants (students, faculty, administrators, and other community members) should reflect on what needs doing, why, what skills and tools are necessary, who should be involved, relevant aspects of the culture of the community, and other issues. Throughout the activity, organized reflection can address what works, what doesn't, what to do differently, which early expectations have proven true, which ones haven't, and many other issues. Such reflection—which can integrate group discussion, writing assignments, and a host of other methods—can benefit both participant learning and community outcomes. ■

For additional information, contact the National Service-Learning Clearinghouse at 1-800-808-7378 or serve@tc.umn.edu or visit www.umn.edu/~serve. To contact a volunteer peer mentor in service-learning,

contact the National Service-Learning Exchange by calling toll-free 1-877-572-3924, e-mailing lsaexchange@nylc.org or visiting www.lsaexchange.org.

For help with education or literacy programs, call LEARNS, the Corporation's T/TA provider for educational success. LEARNS is a partnership of the Northwest Regional Educational Laboratory, 1-800-361-7890, www.nwrel.org/learns, and the Bank Street College of Education, 1-800-930-5664.

Literacy Projects

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Identifying Appropriate Space within a School for Tutoring Sessions

Space is at a premium because schools are frequently overcrowded. Volunteers may initially find they must hunt for a space to work one-to-one with children and to consistently call their own. Not having consistent space for tutoring and volunteer meetings can cause volunteers to feel that the project lacks structure and organization.

Although space for volunteers may have been identified in the original proposal, without a doubt it must be addressed again when actually beginning work in a school. Be polite and respectful when working with school administrators, but be very clear in letting them know that space is essential to working with children and to the success of the project. The space does not need to be fancy, but needs to be set apart in some way, with some sense of privacy so there are not a lot of distractions.

Evaluating and Assessing the Impact of the Project's Work

With any literacy project, it is sometimes difficult to know what to measure, how to measure success and how to communicate the progress of the project. There are many ways to demonstrate the positive impact of your project. Work with your school principal or leader to identify areas of your program that will be evaluated by the school. Communicate what you need to know and mutually decide when this information will be provided to you. If possible, arrange in advance to work with a local evaluator who can provide assistance to your project. This evaluator should be willing and able to have an ongoing relationship with your project. ■