

## 4 ~ 6 Months

# *Sustaining the Program*



Now that you have reached this point...take a deep breath, relax a little, then do some reflecting. How did my recruitment and enrollment go? Are my partnerships in place and working? Are my administrative requirements being met? Did my orientation work? Is the training calendar appropriate?

The 4-6 month program phase gives you an opportunity to examine your work and your program through the lens of continuous improvement. You will conduct site visits and AmeriCorps member midterm evaluations, but more importantly you will apply meaning to them. What does this examination imply about the need to improve our program? What does it say about how well we are meeting our program's performance measures and the community's needs?

You get to look forward and backward at the same time. What has my recent experience told me that I should apply to the next time I do this particular task? For example, what should I put in place for next recruiting season? How should I modify my site agreements?

### ***At the end of this section, you will be able to***

- Assess and report progress on performance measures.
- Plan, design, budget, and execute a staff retreat.
- Access and use a variety of tools and electronic resources to complete all activities in the Tools for Success section.

# 4 ~ 6 Months Program Development & Management



## Progress Report

### What is the Progress Report?

A progress report is the report on the progress of your AmeriCorps program towards meeting its performance measures. It is submitted electronically through WBRs. The WBRs includes a section where you will find the forms that should be completed in order to compile your progress report. The progress report will include information about your Corps member enrollment, hours, performance measures, accomplishments, outcomes, and great stories.

### Why do you need to submit a Progress Report?

Each state commission has different requirements regarding the submission of progress reports. Generally, progress reports provide the commissions and/or parent organizations with a “picture” of how the program is functioning. Check with your commission or parent organization to determine progress report submission requirements.

### How do you do it?

✓	Complete the training for WBRs through your state commission.
✓	Complete the initial set up of the WBRs system.
✓	Check with your commission or parent organization to determine how many times per year you need to submit a progress report.
✓	Ensure there are systems established to record and capture required data. This includes establishing data collection systems with your Service Sites.
✓	Maintain an on-going file of information so that you have it ready when you need it for the APR.

### Frequently Asked Questions

**When do we submit a progress report?** *Consult with the reporting policies established by your Commission or national direct parent organization to determine when the progress report is submitted. CNCS requires that direct grantees of the Corporation (National parent organizations, commissions, tribes and territories) submit an annual report called the Grantee Progress Report. This is submitted through WBRs within approximately 45-60 days of the end of the CNCS fiscal year September 30<sup>th</sup>.*

# 4 ~ 6 Months Program Development & Management



## Assess and Report Progress on Performance Measures

### What does it mean to Assess and Report Progress on Performance Measures?

Once your program is in full swing, it is time to begin assessing program accomplishments. The idea is to chart progress toward goal accomplishment, determine the success of partnerships, and determine what is working and what needs improvement. Once you have done the assessment, you should report progress to all stakeholders.

### Why should you Assess and Report Progress on Performance Measures?

Simple. You want to ensure that everyone is doing what they said they would do, members are experiencing a productive and successful service year, communities being served see value in the service the members are providing, and to ensure everything is on target. Most importantly, progress equates to a better chance of continued funding.

### How do you do it?

✓	Identify staff person(s) responsible for collecting and analyzing data.
✓	Work with your host sites and other partners to identify a method for disseminating and collecting the performance measurement tools (surveys, interview protocols, etc.).
✓	Establish a system that collects program data on a monthly basis.
✓	Review any performance measurement data gathered from an external evaluator.
✓	Invite your host site partners, community partners, Corps members, and community members served to participate in completing your Customer Satisfaction Survey.
✓	If a site visit has been conducted, use that data also to assess performance measures.
✓	Implement a variety of performance measurement tools and use the data to evaluate program achievement and identify challenges. (See Resources)
✓	Revisit program goals with partners. Identify next steps and set targets.
✓	Report relevant information on the WBRs progress report.

### Resources

Resource	Description	Contact
National Service Resource Center	<p><i>Great sample forms to tailor to your program.</i></p> <p>The NSRC supports and serves the programs of the Corporation for National and Community Service helping to promote volunteerism and community service activities throughout the USA.</p>	<p><a href="http://www.nationalserviceresources.org/resources/sample_forms/">http://www.nationalserviceresources.org/resources/sample_forms/</a></p> <p>XVI.B.2.PDF -&gt; AmeriCorps Community Survey</p> <p>XVI.E.2.PDF -&gt; AmeriCorps Program Director Survey</p> <p>VIC1.PDF -&gt; AmeriCorps member mid-year self-evaluation form</p> <p>VID1.PDF -&gt; Service site evaluation of AmeriCorps program and members</p> <p>VID2.PDF -&gt; Site supervisor check-up for AmeriCorps</p>

# 4 ~ 6 Months

## Program Development & Management



### *Refine Annual Calendar*

#### **What does it mean to refine your annual calendar?**

At this point in the program cycle, you may have a better picture of the activities and events that impact program planning and operations. It's a perfect time to review and make adjustments to the calendar based on what you are learning and seeing.

#### **Why should you refine your annual calendar?**

By revisiting and updating the program calendar, you are taking into account the lessons learned during the first few months of the program. The result will be a stronger, more on-target program.

#### **How do you do it?**

✓	Pull together and review any performance measurement data you have about the program.
✓	Review performance measures and end outputs.
✓	Bring together relevant staff members to participate in the review and revision of the program calendar.
✓	Make sure that stakeholders who have activities that could impact the revised program calendar are invited to participate.
✓	Bring together your service site partners to review and revise the program calendar.
✓	Share the revised program calendar with all members of the organization.

# 4 ~ 6 Months Program Development & Management



## Staff Retreat

### What is a Staff Retreat?

Take a breather, reconnect, reevaluate, chart the next six months—that's what a staff retreat is all about. Sometimes it may serve the dual purpose of a retreat and training workshop. It is primarily an occasion for all the staff to come together, usually away from the office, to review past activities and chart the goals and targets for the future.

### Why should you conduct a Staff Retreat?

The process of starting up a program takes an incredible amount of energy. A mid-year staff retreat gives everyone a chance to step back and gain perspective on what has happened in the program. It's also a time to celebrate the successes and make adjustments where needed.

### How do you do it?

✓	Conduct a needs assessment using interview and/or surveys to determine staff training needs and to identify key programmatic and management issues that need attention.
✓	Design the retreat using information gathered from the above needs assessment.
✓	Work with senior management and a steering committee that represents a cross-section of staff to create the agenda. Ensure the retreat schedule doesn't compete with other organizational priorities.
✓	Develop and communicate clear goals and objectives of the retreat. See <a href="#">Conducting an Effective Staff Retreat</a> .
✓	Prioritize the issues you want the retreat to address.
✓	Include team building and networking activities so the staff can develop stronger linkages between each other.
✓	Ensure your budget can support the staff retreat.
✓	Identify an off-site space to conduct the retreat. The staff needs to be away from the office to really focus.
✓	Invite outside presenters/trainers to bring new learning to the organization. If you use an outside consultant, clearly communicate what you want to achieve.
✓	Follow through on the suggestions or recommendations that arise in the retreat.

### Resources

Resource	Description	Contact
<b>State Commission, Parent Organization, or other AmeriCorps groups.</b>	Training and Technical Assistance Providers and Resource list. Use this to identify potential external trainers.	<a href="http://www.nationalservice.org/resources/training/index.html">http://www.nationalservice.org/resources/training/index.html</a>
<b>Starting Strong: A Guide to Pre-Service Training</b>	Good information about training implementation.	<a href="http://www.etr.org/nsrc/pdfs/startingstrong/starting.html">http://www.etr.org/nsrc/pdfs/startingstrong/starting.html</a>

### Frequently Asked Questions

**What benefit is gained from holding a retreat off-site?** *The biggest benefit is focus. Without the distraction of the everyday work pressures, staff members are able to focus and fully participate in the workshop.*

*TOOLS*  
*for*  
*SUCCESS*



## *Conducting an Effective Staff Retreat*

Retreats are a valuable resource, but much of their potential can be wasted if they are planned ineffectively. Retreats should always be a forum for learning and working together that supports program activities in the field.

### **Consider the following when implementing a retreat:**

- Define the desired outcome of the retreat.
- Determine who needs to attend in order to accomplish the desired outcome.
- Decide whether you will use a facilitator to help plan the agenda and manage the retreat.
- If you use a facilitator, decide whether s/he should be from outside the organization or inside the organization.
- Once you know how many people to invite, the type of space you need, etc., identify a facility that can accommodate your requirements.
- Visit the facility if you are not familiar with it to verify the accommodations.
- Develop an agenda for the meeting and determine whether you want the attendees to do any work prior to the retreat.
- Schedule some "fun" or "down" time for attendees to reflect and just enjoy being together.
- Hold retreats that last longer than a day at the beginning of the week. Participants will be much more focused if they have had the weekend to relax.
- Reconfirm details with the facility a few days before the retreat.
- Arrive early the day of the retreat to set up the room.
- Ask everyone to complete a Retreat Feedback Form at the end of the retreat.

### **Outcome or impact achieved:**

Properly implemented retreats can create a setting that encourages communication and strengthens bonds as well as give you a better understanding of your participant/staff needs.

*Source: Corporation for National Service. Handbook for Continuous Improvement, Tools & Practices, Participant/Staff Retreat, pp. 1-12.*