4 ~ 6 Months
Community & Site Partnerships

Much of the success of your AmeriCorps program relies on the strength of your relationships with Service Sites and other community partners. Your role in these partnerships includes several elements. First, you want to ensure that your AmeriCorps members are engaged in productive service. Second, you want to determine whether on-site member development activities are taking place along with appropriate supervision and support. Third, you want to identify whether the Service Site is maintaining appropriate and accurate records. Finally, you want to determine what training or supports are needed by community partners to sustain the relationship. This section will prepare you to fulfill your role.

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

- ❑ Plan and conduct a site monitoring visit to assess the strengths and needs of your subgrantees or service sites.
- ❑ Access and use a variety of tools and electronic resources to complete all activities in the Tools for Success section.

Site Monitoring Visit

What is a Site Monitoring Visit?
A site monitoring visit is a physical visit to an operating, placement, host, or service site to observe firsthand the work, the challenges, the successes, and the "big picture" of your partners who often may be some distance from the your organization.

Why should you conduct a Site Monitoring Visit?
There are three key reasons to conduct site visits. First, you want to ensure that Corps members are receiving and providing the services the service site partner has agreed to provide. Second, a visit can provide needed support and guidance to sites that are struggling and need timely support. Third, as mentioned above, an in-person visit helps you get a feel for the experiences of this particular site, the members, and the community they serve.

How do you do it?

✓	Review the *Four Types of Site Visits*. Consider which type of site visit you want to complete.
✓	Send or provide service site partner with a copy of the site visit schedule. Review and implement *Site Visit Procedures* and the *Checklist for an Ideal Site Visit* tools.
✓	Provide a copy of the *Desk Audit Form* well in advance of the visit.
✓	Where appropriate use the *Member Files Desk Audit* tool as a checklist of what is supposed to be in the Corps member files.
✓	Review a random sampling of Corps member files. Physically check the contents of the file using the Member Files Desk Audit tool.
✓	Site visits are not punitive. Be open and transparent about the process. Conduct visits regularly or base your visits on a risk assessment of the organization.
✓	Review your completed Site Monitoring Form with the service site partner staff.
✓	Provide sites with *Site Satisfaction* and the *AmeriCorps Site Satisfaction Survey* tools to use to reflect on effective practices. These tools can be helpful in discussing areas of strength and improvement.
✓	Clarify and monitor follow-up actions (compliance issues, staff skill enhancement, etc.) to be taken on the part of the Service site.

Frequently Asked Questions
How many times should I visit a site during the program year? *Every site merits in-person attention. If your budget or staffing levels permit, at least one site visit per site is recommended. Some sites may need more visits and more technical assistance from you than other sites. In cases where sites need a great deal of support, also consider providing it through desk audits, e-mail, phone and fax communications in addition to the in-person visits.*

Who, from my organization, should be involved in the site-monitoring visit? *Certainly someone familiar with the compliance and regulatory issues of the grant should make the on-site visits. Additionally, someone skilled in program management, financial management systems, supervision, and community service would be welcomed as a qualified monitor and provider of technical assistance.*

Who, from the Service Site, should be involved in the site-monitoring visit? *The person(s) responsible for site management, fiscal management, and direct supervision of the AmeriCorps members should be involved. Depending on the purpose and type of site visit it may be appropriate to hear from AmeriCorps members, senior management, board members, community members, or clients.*

Resources

Resource	*Description*	*Contact*
Handbook for Continuous Improvement, 1994	Site Visit Tools and Practices	www.nationalserviceresources.org/ pp. 1-5 and sample formats, 6-19

TOOLS for SUCCESS

Four Types of Site Visits

The National Readiness and Response Corps employs several types of programmatic site visits: Monitoring (includes fiscal aspects), Informational with limited monitoring (e.g. Pre-service orientation), Follow-up Visit, and Monitoring conducted by Operating Sites with multiple locations. Below is an explanation of each type.

1. Monitoring Visits

The NRRC Program staff will conduct a one to two day programmatic site visit at least once every two years. The purpose of this visit is to observe the operations of the site's program and to address any specific compliance or continuous quality improvement issues.

A typical site-monitoring visit consists of the following:

- An interview with the operating site supervisor;
- Interview(s) with the financial department and a review of financial systems in place;
- Interviews with NRRC members;
- Observation of program activities at local service sites;
- At minimum 50% randomly selected sample of member files;
- Meet with key State Commission, CNCS State Offices to discuss past and/or explore future opportunities for program coordination and collaboration;
- Wrap-up with the program coordinator and staff members; and
- Provide any training or technical assistance on programmatic, management, reporting, program development and / or financial issues as needed.

NRRC program staff will schedule site visits at least four weeks in advance of the visit. One week prior to the visit the host site supervisor will forward an agenda for the visit to the program staff.

Prior to the visit, NRRC program staff will complete a pre-site visit checklist. During the visit the NRRC program staff will review at minimum 50% randomly selected sample of member files.

Immediately after the visit, NRRC program staff will document the visit on the Site Visit Form. Within 15 working days following the visit, NRRC program staff will provide the grantee with a document detailing any compliance issues, quality improvement opportunities and required follow-up actions. Copies will be made available to chapter management and other pertinent staff. The NRRC program staff will continue to use the Site Visit Form to document when the corrective action plan was received and the date(s) the corrective action plan must be implemented.

2. Informational with limited monitoring

This type of site visit may be conducted if an NRRC program staff is in the general area of a local site and is considered to be more "informal", but not necessarily less important than a Monitoring Visit. These visits are generally less than one day. During these visits NRRC program staff will:

- Meet and talk with local site manager;
- Meet and talk with other appropriate staff (as available);
- Meet and talk with NRRC members (as available);
- Discuss concerns from the national level with site staff; and
- Provide training or technical assistance as needed.

If issues of concern or compliance do arise during the visit, the NRRC program staff will review them with the site manager at the time. Immediately after the visit, the NRRC program staff will document the visit on the Site Visit Form. Within 10 working days following the visit, the NRRC program staff will provide the grantee with a document detailing any compliance issues, quality improvement opportunities and required follow-up actions.

Copies will be provided to the chapter management. NRRC program staff will continue to use the Site Visit Form to document when the corrective action plan was received and the date(s) the corrective action plan must be implemented.

3. Follow-up Visit

These visits are only used in cases where the NRRC program staff determines it is necessary, based on previously documented issues and/or as requested by the Corporation for National and Community Service. These visits will follow the same guidelines as indicated by a Monitoring Visit and will specifically focus on compliance issues. They will occur within two months of a prior Site Visit.

Reasons for a Follow-up Visit include, but are not limited to:

- Site is not in compliance concerning financial matters (e.g. members are being paid on an hourly basis, no back up documentation for in-kind has been submitted);
- Findings of inadequate supervision on the part of the site supervisors;
- Staff transition at the chapter since the last Site Visit;
- Members have indicated that the site could be more supportive of members' needs;
- NRRC program staff determines that the site has had a history of consistent problems and questions the future of the program in an upcoming program year.

4. Other

These visits may occur in conjunction with a training event. Please refer to "Informational with Limited Monitoring".

Also, this would include any site visits that are conducted by the Corporation for National and Community Service State Offices. NRRC and the local site are notified in advance of these visits and will work together to ensure a successful visit.

Service Site Satisfaction Survey

Each Service Site Supervisor should complete this Satisfaction Survey.

Service Site: ____ Date: _________
Person Completing this Form: ____

Please read each of the statements below and mark the appropriate box.

How would you rate the Corps members ability in the following areas	Excellent	Very Good	Good	Needs Improveme nt	Don't Know
Preparation to complete the assigned work					
Recruiting Reading Partner volunteers					
Placing Reading Partner volunteers					
Relationship with Reading Partner volunteers					
Relationship with Reading Partner schools (primary contact)					
How satisfied are you with the work of the Corps members?	Extremely Satisfied	Very Satisfied	Satisfied	Mostly Unsatisfied	Not at All Satisfied
WHY?					
How significant was the work of the Corps members to your organization	Extremely Significant	Very Significant	Significant	Not Very Significant	Not At All Significant
WHY?					

Comments:

____
____
____
____
____

Return completed Form to ______________________ By ________________ Thank You

LISC AmeriCorps Site Satisfaction Survey

Name of LISC Site Supervisor: ______________________________ Position: ________________

Name of Placement Site: ___________________________________ City: ___________________

Name of LISC AmeriCorps Member: ___________________________ Date: _________________

LISC AmeriCorps is asking our placement sites to evaluate our work as a national initiative. Please respond to the following questions regarding your experience with the program. Your comments will help us to strengthen our programs and services. Thank you for your time and continued support.

Place a check in the box or boxes next to the activities, programs and/or services provided by the LISC AmeriCorps Member at your site.

- ☐ Housing Counseling
- ☐ Youth Enrichment Programs
- ☐ Volunteer Recruitment
- ☐ Publishing Newsletters
- ☐ Workshops/Training
- ☐ Other
- ☐ Housing Development
- ☐ Tax Preparation Assistance/Job Training/Referral
- ☐ Work with Neighborhood Groups
- ☐ Distribution of Resource/Informational Materials
- ☐ Neighborhood Revitalization

2. For how long have you been supervising the work of this member: _______ months.

3. Using the rating scale below, please rate the LISC AmeriCorps for each of the following items.

5 = Excellent	**4** = Good	**3=** Average	**2**= Fair	**1** = Poor	**N/A=Not applicable**

ITEM	RATING	COMMENTS
1. How well did the objectives & suggested activities for the program fit the mission and scope of work of your organization?		
2. How clear were LISC AmeriCorps service objectives and the expectations of the program?		
3. How would you rate the Member's level of preparation for the placement and the service activities?		
4. How would you rate the training offered to members in helping them perform their service activities?		

5. How would you rate the benefit of monthly meetings to members?		

5 = Excellent	**4** = Good	**3**= Average	**2**= Fair	**1** = Poor	**N/A** = **Not applicable**

ITEM	GRADE	
6. How would you rate the AmeriCorps member’s ability to meet organizational needs?		
7. How would you rate the Member’s ability to meet community needs?		
8. How would you rate the member’s ability to recruit and train volunteers to take on the responsibility for initiating events or activities that are of benefit or interest to the community?		
9. How would you rate the organization’s capacity to offer an increased level of services to the community as a result of the AmeriCorps member’s placement?		
10. How well do you think the organization will be able to sustain the work begun by the member after the member has completed service?		
11. How well did LISC do in helping to solve any placement site or other member/program related issues you may have encountered?		
12. How would you rate the level and effectiveness of communication between LISC and your organization?		
13. How would you rate the level of support you received to manage the AmeriCorps member?		
14. How effective is the LISC AmeriCorps program at attracting and recruiting people into the community development field?		
15. Please rate your overall satisfaction with the LISC AmeriCorps program.		
Other:		
Other:		

Please describe any ways your organization benefited through the participation of an AmeriCorps member. Cite examples, wherever possible.

Please describe any ways the larger community benefited by having an AmeriCorps member placed at your organization:

Please describe any partnerships or collaborations formed with other organizations as a result of the AmeriCorps member's work.

Please tell us how you raise the match requirement for the member's placement.

Comments/suggestions on ways to strengthen the LISC AmeriCorps Program:

Site Visit Procedures

Timeline: Site visit should be conducted 2-4 months after start of program year.

One month prior to visit:	• Contact the program by phone to arrange mutually convenient date for the visit.
2-3 weeks prior to visit:	• Send written confirmation of site visit date and requirements to the Program Director. Confirmation should include a reminder about the length of time the visit will take, a brief agenda for the visit, and specific requests for time with staff members and Corps members. • A copy should be sent to the Commission members who have adopted the program.
2-5 days prior to visit:	• Review WBRS reports, rosters, member forms, and time logs, etc. Check service hours to identify that all information is entered and is up-to-date, review any reports that have been completed. • Review all recent site visit reports and follow-up. Note what the concerns were (if any) and the agreed upon improvements or corrective actions. • Survey Commission staff to determine if there are any other outstanding issues other than those identified above.
Day of the visit:	• Arrive promptly at the agreed upon time. • Wear AmeriCorps identification (pin, button, sticker, shirt). • Follow the agenda. Make every attempt to stay on schedule. • Document the site visit. Make notes on all key comments, questions answered, etc.
Following the visit:	• Within two working days, write a brief thank you note to all of those who participated in the visit. • Within two weeks, complete the formal written site visit report. • Send the site visit report along with a cover letter to the Program Director. The cover letter should indicate whether you require a response to the findings or concerns noted in the report. Usually such responses must be provided within 30 days of receipt of the letter. Identify if the program has requested T/TA. • Send a copy of the site visit report to the Commission member who has adopted the program.
Follow-up:	• If a written response is not received on the date requested (and an extension not granted), resend the site visit report to the next level of authority within the organization. The cover letter should indicated the overdue response and allow for an additional 2 weeks to provide the requested information. • If a written response is not received after the second request, notice should be sent to the certifying official (who signed the grant application) that reimbursements are being held pending receipt of the requested response.

Adapted from the Missouri Service Commission

Checklist for an Ideal Site Visit

Advance Arrangements Timeline:

- Confirm dates with program coordinator and send checklist (four weeks prior)
- Reserve plane ticket and rental car, if flying (four weeks prior)
- Develop itinerary with program coordinator (three weeks prior)
- Make appointments to meet with Lead Agency, if possible (two weeks prior)
- Make hotel reservations (two weeks prior)
- Draw up itemized budget and file “Request for Official Travel” form (two weeks prior)
- Confirm itinerary with coordinator and email to members and supervisors (one week prior)

Do Not Forget To Bring:

- Team Meeting Agenda
- Assessment and interview forms (member, supervisor, training, etc.)
- Operating Site Performance Measures
- Most recent member progress reports
- Analysis of Operating Site’s pre- and post-training questionnaires
- Site In-kind Reports and schedule of missing months
- Status of non-federal match payments
- Addresses and phone numbers of field offices and Lead Agency
- Uniform Order Form (or other items of interest for members)
- AmeriCorps buttons/stickers
- Camera, lodging itinerary, and maps
- Handbook and Policy and Procedure Manual
- Bring organization materials (brochures, pins, etc)

While on the Site Visit:

- Meet with program coordinator and complete Reporting Review and Supervisor Interview forms
- Meet with each member and complete Member Interview Form
- Meet with each site supervisor and complete Supervisor Interview Form
- Meet with each field office team to go over progress toward completing performance measures
- Complete Site Performance Measurement Form for each field office and for site as a whole
- Meet with Lead Agency

Upon Returning to Local Organization:

- Write thank you letter to Program Coordinator and attach Site Performance Measurement form
- Write thank you letters to site supervisors and attach Site Performance Measurement Forms
- Write thank you letters to members and attach Training Performance Measurement Forms with personalized notes
- Follow up on any action items revealed during the visit
- Write thank you letters to Lead Agency, if necessary

[on your organization's letterhead]

Desk Audit Tool

SECTION A: DOCUMENTATION

Below is a list of items designed to verify for LOCAL ORGANIZATION your site's compliance with key programmatic and operational requirements. Please send these to ___________________ by [insert deadline.]

- Copies of Program Coordinator and Site Supervisor Position Descriptions
- Copy of site's liability insurance policy
- Evidence that your site is a drug-free work place
- Evidence your site has a non-discrimination policy that includes providing reasonable accommodation to persons with disabilities
- Sample of travel reimbursement form used to pay for member or staff mileage
- Sample of log used by member to track _______________________
- Sample of member personal development plan

SECTION B: STATUS OF COMMITMENTS TO LOCAL ORGANIZATION

LOCAL ORGANIZATION has indicated the status of key commitments to the program. Please respond as necessary.

Payment of Participation Fee (i.e. cash match)

____ Yes, paid in full. Thanks!
____ Past Due

If past due indicate reason and expected date of transmission to LOCAL ORGANIZATION. Name who in the organization is responsible for the transmission if someone other than the Program Coordinator.

Completion of quarterly in-kind reports

___ Up-to-date. Next deadline is [Insert upcoming report schedule]
___ Past Due

If past due indicate reason and expected date of transmission to LOCAL ORGANIZATION. Name who in the organization is responsible for the transmission if someone other than the Program Coordinator.

List of any ***PAST DUE*** member enrollment or evaluation materials.

PLEASE NOTE THESE ITEMS ARE DUE AT THE TIME THE DESK AUDIT IS RETURNED.

____ Enrollment Paperwork
____ Pre-service Community Interviews

____ Mid-term evaluations of members
____ *Add needed information*

PLEASE REMEMBER, THE NEXT PROGRESS REPORT IS DUE ______________________

SECTION C: CONTINUOUS IMPROVEMENT AND SUSTAINABILITY

What State Commission events have you and your members attended or will attend this year?

Member Enrollment Commitment [Insert #]
Member Enrollment to-date [Insert #]

Please describe your plans to develop and retain currently enrolled members. What recruitment methods will you use beginning this fall for program year _______?

3. Have your members been or will they be involved in any local or national service activities in cooperation with other National Service sites (i.e. AmeriCorps, VISTA, RSVP)? If yes, which and how? If no, why not?

On a scale of 1 to 10, with 10 being “excellent,” 5 being “mediocre” and 0 being “awful,” rate the following:

_____ Training and technical assistance provided by LOCAL ORGANIZATION

_____ Success at recruiting and retaining quality AmeriCorps members

_____ Member achievement of service goals

_____ Value of AmeriCorps program to your operations

_____ Value of AmeriCorps program to your members

_____ Value of AmeriCorps program to your community

_____ Overall level of satisfaction with the AmeriCorps program.

Please list any areas not covered above that you would like to discuss with LOCAL ORGANIZATION directly:

{Program Director} will call to arrange a phone appointment to discuss these areas as well as the rest of the document items with you. Thank you for your time and effort.

Member Files Desk Audit

National Readiness & Response Corps
Desk Audit of Member Files

The goal of the "desk audit" is to determine if the local site is compliant with their documentation of member files. In addition, to verify hard copies for accuracy with information found on WBRS.

Local sites will be asked to forward a minimum of seven files throughout the year (random selection to be determined by NRRC program staff). NRRC program staff may ask for files from prior program years. In accordance with the AmeriCorps Provisions, sites should maintain all member files for up to three years after the close of the grant.

NRRC Operating Site Location:____

Program Year:____

Site Manager: ____

NRRC Member: ____

Are the following items in the member's file?	Yes	No	Comments/Files missing
Member application			
AameriCorps enrollment form • Is it signed and dated by the member? (Will be approved by site supervisor via WBRS) • Was the form entered onto WBRS within 30 days of enrollment? • Were hard copies of the forms sent to the program headquarters by the date specified?			
Member Agreement / Contract Is the site utilizing the NRRC Member Agreement of Participation? • Is it signed and dated by the member? • Is it signed and dated by the site manager? • If the member did not begin service on the start date, are the dates on the agreement adjusted?			
Member Activity Summary Sheets (MASS)/Service Hour Logs • Do both the member and the site supervisor sign logs? • Are they up to date? • Do the hour logs segregate/track separately hours for service vs. hours for training? • Are the site supervisor's in kind time indicated? • Did the member complete the service reflection section? • Do the WBRS reports match what is on the hard copy version? • Were the WBRS reports uploaded by the appropriate date for Parent Org. review?			
Documentation of citizenship/naturalization/resident alien status Primary documentation of status as a US citizen or national. *One of the following forms of documentation is acceptable and should be attached:* Documents to verify a member's status as a citizen or national include; • A birth certificate stating that they were born in one of the 50 states, DC, Puerto Rico, Guam, the US Virgin Islands, American Samoa, or the Northern Mariana islands; • A US passport, current and current • A report of birth abroad of a US 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); and • A certificate of naturalization (From N-560 or N-561 issued by the Immigration and Naturalization Service); Documentation to verify a member's status as a lawful permanent resident alien of the US include: • Permanent Resident Card (INS Form I-551); • Alien Registration Receipt Card (INS Form I-551); and • Departure Record (INS Form I-94) indicating that the INS has approved it as a temporary evidence of lawful admission for permanent residence;			

Are the following items in the member's file?	Yes	No	Comments/Files missing
High school diploma/GED • Has member certified on the enrollment form that they have a high school diploma/GED? • Does the operating site have the ***date*** of when the member received their high school diploma or GED?			
Documentation of Health Care Enrollment (if member is eligible) • If the member has exited, is there a termination letter on file stating when their AmeriCorps health care benefits ended? • Was the NRRC program headquarters notified within two weeks of member's exit so that the SRC roster is updated? • If there are any questions on healthcare coverage, please contact the program headquarters.			
Disaster Services Human Resources Enrollment • Has the member been enrolled in the DSHR system on file? • Is there a copy of the member's DSHR enrollment form on file? • Is there a copy of the member's DSHR acceptance letter on file? • Is there a copy of the member's disaster assignment WPE on file?			
Documentation of Child Care Enrollment (if member is eligible) ***A member will only be considered eligible for child care benefits if*** ◦ *they are a full-time stipend member,* ◦ *the member is the parent or legal guardian (or acting in loco parentis) for a child under the age of 13 who resides with the member,* ◦ *the member has a family income that does not exceed the state's income eligibility guidelines for a family of the same size. At a maximum, family income can be no more than 75% of the state's median income; and* ◦ *at the time of acceptance into the Program, member is not receiving childcare from another available source.* • If there are any questions on childcare coverage, please contact the program headquarters.			
Tax documents • Is there a W-4 form to document tax withholdings? • If the program year is over, is there a W2 form?			

Are the following items in the member's file?	Yes	No	Comments/Files missing
Member discipline documentation • Was the member disciplined in accordance with the guidelines as indicated in their member agreement and program handbook?			
Mid-term performance evaluation • Was the mid-term Service Performance Review completed on time?			
End of term performance evaluation • Was a final Service Performance Review completed prior to member's out-processing? • Is there a copy in member's file?			
Member End of Term/Exit Form (if member has exited) • Is it signed and dated by the member in the two places indicated? • Is the supervisor signature concurrent with or after the member's? • Is the form approved by the site supervisor on WBRS? • Was the form submitted within 30 days on WBRS?			
Documentation of Compelling Personal Circumstances (if applicable) • If the member received a pro-rated ed-award (check the exit form), is there documentation of compelling personal circumstances that falls within the parameters identified in the AmeriCorps Provisions for the relevant program year? (WBRS will check this.)			
Change of Status Form (if applicable) • Do enrollment form and exit form for each individual reflect the same term of service? • If not, is there an approved change of status form in the file that reflects the appropriate conversion? • Was the conversion made within the first three months of the member's term? If not, is there evidence of grantee and Corporation approval? • Was the form submitted to the Corporation within 30 days? *(Needs to be verified at CNS)*			