

IDHS-Serve Illinois AmeriCorps Program Director's Manual 2024-2025



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PART ONE

Overview and Introduction

Welcome

Congratulations on being funded as an Illinois AmeriCorps State Program! As you embark on this journey of national service, we are committed to providing you with the guidance, oversight, and support necessary to create a strong and impactful AmeriCorps program. We recognize the importance of your role as a program director, and we want to assist you in navigating the many moving parts of national service.

To help you get started, we encourage you to utilize this AmeriCorps manual as a valuable resource for understanding federal rules and regulations and ensuring that your program remains compliant. We believe that this manual will be an excellent starting point and reference guide for familiarizing yourself with the intricacies of the AmeriCorps program and its requirements.

We are excited to work with you and support you throughout your national service journey!

Purpose of the Manual

The Illinois AmeriCorps Program Director's Manual has been specifically designed as a guide for those who administer AmeriCorps State programs within Illinois. This manual will assist in detailing the process for monitoring, supporting, and evaluating programs and, above all, for working collaboratively to make the AmeriCorps State programs in Illinois successful.

While detailed, this document does not contain all required information for an AmeriCorps State program and should be used in conjunction with all [IDHS Grants Administration](#).

It is expected that Illinois AmeriCorps program staff will familiarize themselves with the information contained within this manual and take responsibility for using the manual and related documents to obtain information necessary for the day-to-day operation of their AmeriCorps program.

The program manual will be revised as needed. Revisions will be posted on the IDHS-Serve Illinois Basecamp site. It is the responsibility of each Program Director to stay up-to-date and abide by all changes to policies and procedures. It is recommended that the program use the most recent version of the manual from the website each time it must be referenced.

This manual does not describe in depth all the Federal and/or State rules that govern the work of Illinois AmeriCorps programs but attempts to highlight those that are critical to the operations of a compliant and successful AmeriCorps program.

Acknowledgement of Support.

This material is based upon work supported by AmeriCorps, the operating name of the Corporation for National and Community Service. Opinions or points of view expressed in this document are those of the authors and do not necessarily reflect the official position of, or a position that is endorsed by, AmeriCorps or AmeriCorps State and National.

[Acknowledgement and Appreciation](#)

IDHS-Serve Illinois would like to acknowledge that this manual includes information sourced from AmeriCorps Program Manuals created by the following Commissions: Serve Washington, Volunteer Iowa, Serve Montana, Serve Wyoming, Serve Indiana, and UServeUtah. We appreciate the time and effort the staff at those Commissions invested in the development of their own resources that made the creation of this manual easier.

Key Information

IDHS-Serve Illinois Staff

Bureau of Volunteerism and Community Service Staff:

- Associate Director, Office of Community & Positive Youth Development – Karrie Rueter
- Executive Director – Andres J. Fernandez
- Bureau Chief, Bureau of Volunteerism and Community Services – Cory Blissett
- Fiscal/Data Analyst – Kim Doyle
- Administrative Assistant – Rachael Tuxhorn
- Illinois AmeriCorps Program Manager – Kristen Bethke
- Illinois AmeriCorps Program Officer (Downstate) – Allison Miller
- Illinois AmeriCorps Program Specialist (Downstate) – Andrea Spellman
- Illinois AmeriCorps Program Officer (Upstate) – Teesha Pendleton
- Illinois AmeriCorps Program Specialist (Upstate) – Katrina Ellis
- Illinois AmeriCorps Program Officer (Chicago) – Raja Banerjee
- Illinois AmeriCorps Program Specialist (Chicago) – Heather Cropp
- Communications Coordinator – Vacant
- Grants Coordinator – Brittany Schwien
- Volunteer Services Program Manager – Jacob Jenkins
- Volunteer Services Coordinator Downstate – Anthony Wanless
- Volunteer Services Coordinator Upstate – Cecilia Maciel Martinez
- National Service Program Manager – Davida Fanniel
- National Service Program Officer – Stacie Reichensperger
- National Service Program Specialist – Brooke Miller

Important Websites

The following websites contain information or provide resources critical to managing a successful AmeriCorps program. For your convenience, individual page links have been embedded throughout this manual for easy reference.

AmeriCorps the Federal Agency

- [State Subgrantees](#)
- [Manage Your Grant](#)
- [AmeriCorps Strategic Plan](#)
- [AmeriCorps Equity Action Plan](#)
- [Litmos \(AmeriCorps Online Courses and Learning Paths\)](#)

IDHS-Serve Illinois

- [IDHS-Serve Illinois Basecamp](#)

- [IDHS-Serve Illinois Website](#)

Let's get social! We encourage you to follow us on:

- [Facebook](#)
- [Instagram](#)
- [LinkedIn](#)
- [YouTube](#)
- [X \(Twitter\)](#)

Laws, Regulations, other Federal governing authorities

Subawards/subgrants/subrecipients from AmeriCorps to IDHS-Serve Illinois are subject to the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards located at [2 CFR Part 200](#) and the agency's implementing regulations at [2 CFR Chapter XXII](#). IDHS-Serve Illinois staff, award recipients and subrecipients must read, understand, and implement these federal regulations. Familiarity with the Uniform Guidance, or 2 CFR Part 200, is critical to IDHS-Serve Illinois' management of subrecipient awards.

In addition to the applicable statutes and regulations referred to above, IDHS-Serve Illinois and its subrecipients must comply with and perform its award consistent with the requirements stated in:

1. The Notice of Grant Award and Signature Page (available in your eGrants account)
2. [General Terms and Conditions \(FY24\)](#)
3. The Program or Grant-Specific Terms and Conditions [AmeriCorps Terms and Conditions](#)
4. The Notice of Funding Opportunity
5. The subrecipient's approved application (including the final approved budget, attachments, and pre-award negotiations);
6. [Grant Assurances](#);
7. Grant Certifications; and
8. Other governing authorities include (this list is not inclusive):
 - [Public Law 109-282, the Federal Funding Accountability and Transparency Act \(FFATA\) of 2006 as amended](#)
 - [National and Community Service Trust Act of 1990, as amended by Public Law 111-13](#)
 - [Executive Order 13166, "Improving Access to Services for Persons with Limited English Proficiency"](#)
 - [Title VI, of the Civil Rights Act of 1964](#)
 - [The Rehabilitation Act of 1973, §§ 504, 508](#)
 - [The Drug Free Workplace Act of 1988, 41 U.S.C. §§ 8101-8106](#)
 - [The Whistleblower Protection Act of 1989, P.L. 101-12](#)

Order of Precedence regarding management of AmeriCorps grants

Any inconsistency in the authorities governing the Award shall be resolved by giving precedence in the following order:

1. Applicable Federal statutes
2. Applicable Federal regulations
3. Notice of Grant Award and Signature Page

4. AmeriCorps Program Specific Terms and Conditions
5. AmeriCorps General Terms and Conditions
6. The Notice of Funding Opportunity, and (g) the approved Award Application including all assurances, certifications, attachments, and pre-award negotiations.

National Service

History of National Service and AmeriCorps

National service in the United States has a long history, dating back to the ideas of American philosopher William James in the early 20th century. James proposed the concept of a "moral equivalent of war" in which young people would engage in national service, similar to military service, but for the purpose of contributing to society rather than fighting in wars.

The idea gained traction in the decades that followed, and during the Great Depression, President Franklin D. Roosevelt established the Civilian Conservation Corps (CCC) to provide work and job training for unemployed young men. The CCC was widely regarded as a successful national service program, and it helped to pave the way for future initiatives.

In the 1960s and 1970s, a number of national service programs were established, including VISTA (Volunteers in Service to America) and the Peace Corps. These programs aimed to address social and economic issues through volunteerism and service.

The modern era of national service began in 1993 with the passage of the National and Community Service Act. This legislation created the Corporation for National and Community Service, which oversees several national service programs, including AmeriCorps, Senior Corps, and the Social Innovation Fund.

AmeriCorps is the flagship national service program, and it provides funding for nonprofit organizations and public agencies to recruit and manage volunteers. AmeriCorps members serve in a variety of roles, including education, environmental conservation, disaster relief, and public health.

Since its creation, the Corporation for National and Community Service has helped to mobilize millions of Americans in service to their communities and the country as a whole. Today, national service remains an important part of American civic life, and it continues to inspire young people to engage in public service and make a positive impact on society.

AmeriCorps Headquarters (AC HQ)

[AmeriCorps](#) the federal agency for national service and volunteerism. AmeriCorps provides opportunities for Americans of all backgrounds to serve their country, address the nation's most pressing challenges, and improve lives and communities. AmeriCorps and IDHS-Serve Illinois share the goal of expanding national opportunities for all Illinois state residents, as well as promoting volunteerism and service as a means to addressing vital community needs in the communities that need this support the most.

AmeriCorps empowers and supports Americans to tackle persistent challenges such as helping youth succeed in school, securing safe affordable housing for economically disadvantaged families, or helping communities respond to disasters. Through this work, AmeriCorps achieves its mission of improving lives, strengthening communities, and fortifying the civic health of our nation.

AC HQ creates a strategic plan with the most updated version available on their website here. AmeriCorps established funding priorities in their 2022-2026 plan that included:

1. Disaster Services
2. Economic Opportunity
3. Education
4. Environmental Stewardship
5. Healthy Futures
6. Veterans and Military Families

AmeriCorps Strategic Priorities and Goals

To ensure agency resources are focused on addressing Administration priorities and the evolving needs of communities, AmeriCorps is aligning its planning and programming under a core set of priorities where national service can have the greatest impact. These strategic priorities are detailed in the AmeriCorps 2022-2026 Strategic Plan. The following strategic goals will guide how AmeriCorps focuses its resources and prioritizes its learning and evidence building opportunities.

- Goal 1: Partner with communities to alleviate poverty and advance racial equity.
- Goal 2: Enhance the experience for AmeriCorps members and AmeriCorps Seniors volunteers.
- Goal 3: Unite Americans by bringing them together in service.
- Goal 4: Effectively steward federal resources.
- Goal 5: Make AmeriCorps one of the best and most equitable places to work in the federal government.

The agency has also prioritized a set of objectives that will inform the strategies and tactics necessary for attaining agency goals. For example, objectives like “Prioritize Investments in Underserved Communities”, “Recruit Diverse Corps of Members & Volunteers”, and “Expand Education & Economic Opportunity” will guide the implementation of the agency’s strategic plan and inform its strategic learning and evidence building priorities. Learn more about all the elements of the plan at [Strategic Plan | AmeriCorps](#).

AmeriCorps agency staff work closely with IDHS-Serve Illinois staff and are key participants and advisors on the direction of AmeriCorps service in the state. AmeriCorps, VISTA, NCCC, and AmeriCorps Seniors stakeholders often come together to plan and coordinate projects in various regions of the state and assist the Commission with the development of the State Service Plan.

AmeriCorps National Service Program Details

Disclaimer: Illinois Department of Human Services/Serve Illinois does not currently manage all the programs listed below but fully supports all programming overseen by the AmeriCorps Agency.

[AmeriCorps.NCCC](#)

Organizations may apply to host a team of AmeriCorps NCCC members to provide intensive, short-term service on projects in the areas of disaster services, environment, infrastructure improvement, energy conservation and urban and rural development. Projects are normally six to eight weeks in duration but will vary depending on the requirements of the project. Organizations must be capable of utilizing at least one full team of eight to twelve members effectively. The NCCC campus located in Vinton, Illinois serves multiple states including Illinois. For more information about NCCC and how to apply, go to: [AmeriCorps NCCC](#).

[AmeriCorps.VISTA](#)

Organizations can also apply to become a host site in an existing AmeriCorps VISTA project, or they can directly sponsor their own AmeriCorps VISTA project. In general, AmeriCorps VISTA focuses on anti-poverty, community empowerment, and sustainable solutions by having members provide capacity building services at their host organizations. AmeriCorps VISTA project sponsors must be able to support three or more full-time AmeriCorps VISTA members serving for one-year on an anti-poverty project. The AmeriCorps Midwest Office of Regional Operations manages VISTA program in Illinois. For more information about VISTA, go to: [AmeriCorps VISTA](#).

[AmeriCorps.State.and.National.-.AmeriCorps.IDHS_Serve.Illinois](#)

Illinois AmeriCorps State grants provide funding to help organizations manage an AmeriCorps program, which involves recruiting, training, and supporting a cohort of AmeriCorps members who serve on a full-time or part-time basis to help the organization address a community need. Grants are awarded on a competitive basis to projects that support organizational capacity-building, education, healthy futures, environmental stewardship, veterans and military families, economic opportunities, public safety, disaster preparedness/response, and other identified community issues in Illinois. Successful programs utilize service as a strategy to meet community needs, while supporting the development and growth of the AmeriCorps members serving with the organization.

[AmeriCorps.National](#)

AmeriCorps National grants provide funding to help organizations manage an AmeriCorps program that operates in more than one state. Some AmeriCorps National grantees act as intermediary organizations and accept applications from organizations wishing to serve as host sites for AmeriCorps member positions.

See the current list of IDHS-Serve Illinois AmeriCorps programs in Basecamp.

[AmeriCorps.Seniors](#)

Each year AmeriCorps Seniors taps the skills, talents, and experience of persons aged 55 and older to meet a wide range of community challenges through three programs: RSVP, the Foster Grandparent Program, and the Senior Companion Program. AmeriCorps Seniors RSVP volunteers recruit and manage other volunteers, participate in environmental projects, mentor, and tutor children, deliver meals to the homebound and respond to natural disasters, among many other activities. AmeriCorps Seniors volunteers in the Foster Grandparents Program serve one-on-one as tutors and mentors to young people with special or exceptional needs. AmeriCorps Seniors volunteers in the Senior Companions Program help adults maintain independence in their homes. The AmeriCorps Midwest

Office of Regional Operations manages the Senior Corps programs in Illinois. Go to [AmeriCorps Seniors](#) to find out more about their programs.

[Volunteer.Generation.Fund.\(VGF\)](#)

The Volunteer Generation Fund (VGF) grant is used to develop and/or support community-based entities to recruit, manage, and support volunteers. AmeriCorps seeks to fund effective approaches that expand volunteering, strengthen the capacity of volunteer connector organizations to recruit and retain skill-based volunteers, and develop strategies to use volunteers effectively to solve problems. VGF can be used to carry out the activities supported under the award or to carry out the activities by making subgrants to community-based entities, supporting volunteer generation at these entities. IDHS-Serve Illinois is contracting with the University of Illinois to develop a Civics curriculum that will be taught in every school in Illinois. The intent is to engage students at an early age and instill in them an ethic of public service and volunteering.

[National.Days.of.Service](#)

Annually, there are many events celebrated both locally and nationally across the National Service Network. Each occasion is an opportunity to spotlight an AmeriCorps State program's impact while fulfilling programmatic needs. Some examples of what can be achieved during these events are: raising member morale, inspiring Illinois residents, recruiting new individuals, and expanding your program's reach in communities. A few AC-sponsored events are described below.

IDHS-Serve Illinois promotes National Days of Service through their communications channels. All Illinois AmeriCorps programs are required to plan or participate in the annual Martin Luther King, Jr. Day of Service and also one additional day of service. More about this requirement can be found later in the manual.

History and background of IDHS-Serve Illinois

[Background](#)

State Service commissions were created in the National and Community Service Trust Act as amended in 1993 and are the state partners of the federal agency, the Corporation for National and Community Service (now dba, AmeriCorps). The IDHS-Serve Illinois Commission (IDHS-Serve Illinois or the Commission) operates under the authority of both [20 ILCS 1345, P.A. 102-264](#) and the [National and Community Service Act of 1990, as amended by P.L. 111-13](#). The Commission's role includes development of a comprehensive State Service Plan establishing statewide funding priorities for AmeriCorps State programs in Illinois, awarding and administering Illinois' AmeriCorps State grants, monitoring program compliance, providing program development and training to Illinois' national service programs, promoting and recognizing volunteerism within the state, and providing volunteer management training opportunities to AmeriCorps programs, non-profits, governmental agencies, schools and other interested organizations.

The enabling legislation of the IDHS-Serve Illinois Commission on Volunteerism and Community Service promotes, partners, and supports community service in public/private programs, while stimulating new volunteerism/community service initiatives to meet the needs of Illinois citizens. Within the Illinois Department of Human Services, IDHS-Serve Illinois serves as a resource to advocate for community service agencies, volunteers and programs which utilize State and private

volunteers. IDHS-Serve Illinois oversees all aspects of program administration and training for the Illinois AmeriCorps program.

IDHS-Serve Illinois staff are employees of the Illinois Department of Human Services and as such, are responsible for ensuring that follow not only the Federal rules that govern their work under AmeriCorps funding, but are also expected to follow State rules, regulations, and guiding principles to fulfill their duties and responsibilities.

Mission.and.Vision

IDHS-Serve Illinois' mission is to strengthen communities through volunteerism, national service, and recognition. We envision an Illinois where the needs of every community are met, and all Illinoisans have the opportunity to give their time, talents, and resources.

The Commission in partnership with the Bureau of Volunteerism and Community Service (BVCS) will expand volunteerism throughout the entire state, connecting rural, suburban, and urban communities, and integrating people of all backgrounds, cultures, ages, and abilities. The Commission and BVCS will also embrace and promote the idea that everyone can recognize their ability and responsibility to strengthen our communities through voluntary service.

IDHS-Serve Illinois Commission:

- Provides guidance and direction to BVCS regarding funding decisions including all AmeriCorps funded programs in Illinois.
- Prepares and updates three-year national service plan for the state of Illinois.
- Prepares a three-year strategic plan in partnership with the BVCS.
- Supports the development of informational materials to increase awareness of volunteers and their organizations.
- Promotes service and volunteerism through awards and other recognition opportunities.
- Supports the coordination of National Days of Service at the state level.
- Promotes awareness of and attendance at training and professional development offerings for volunteers, AmeriCorps Members, and program staff.
- Provides support to the statewide network of volunteer organizations.

BVCS Staff Responsibilities and Support to AmeriCorps State Programs:

- Administers federally funded AmeriCorps State programs; this includes selection, oversight, and evaluation of these grant recipients.
- Facilitation of monthly meetings with Program Directors (mandatory for all programs)
- Provision of annual Program Directors trainings (mandatory for all programs)
- Ongoing training opportunities for program directors and support staff.
- Provide technical support and assistance to programs on programmatic and fiscal issues.
- Provide updates as necessary on emerging program issues and changes.
- Program monitoring

PART TWO

Expectations

IDHS-Serve Illinois Expectations

The goal of this section is to outline the expectations that IDHS-Serve Illinois has for itself and its Illinois AmeriCorps Program. The end objective is to help create and maintain successful AmeriCorps State programs, so Illinois AmeriCorps members have consistent and successful terms of service and communities' benefit from our investment of resources.

Federal and State Rules and Regulations

Subgrantees are required to read and become knowledgeable of all the applicable federal rules and regulations governing their program. These rules and regulations are listed in the previous section.

Subgrantees are required to read and become knowledgeable of the IDHS-Serve Illinois manual and their grant agreement. IDHS-Serve Illinois staff are willing and able to assist programs, but programs are expected to research questions before reaching out to their AmeriCorps Program Officer. The manual is available on the IDHS-Serve Illinois Basecamp site in the AmeriCorps section.

Champions for National Service in Illinois

IDHS-Serve Illinois expects all programs to be champions of national service. This means subgrantees are educated on AmeriCorps to properly educate their communities about the importance of service and volunteerism in Illinois. In addition, programs are expected to educate their members on the larger network of National Service during their service and foster lifelong civically engaged individuals. It is expected that this role will include partnerships and collaborations with other national service entities in the state. This includes networking at IDHS-Serve Illinois events, sharing best practices and coordinating with other programs, service sites and/or members in the community to create innovative approaches to meeting your needs.

Communication with IDHS-Serve Illinois

Your assigned Illinois AmeriCorps Program Officer is your main point of contact. IDHS-Serve Illinois expects programs to notify their officer as soon as there is a change in their program leadership. Program leadership may include, but is not limited to, the Executive Director (or similar), Program Director, and fiscal contacts. For IDHS-Serve Illinois, it is expected they will communicate updates to their Executive/fiscal staff. Lastly, if a Program Director is out of the office for an extended period of time, IDHS-Serve Illinois should be kept updated on other contacts for submission deadlines/questions.

Training Expectations

IDHS-Serve Illinois expects programs to fully participate at all IDHS-Serve Illinois trainings/events. This includes sharing of resources and best practices with other programs. IDHS-Serve Illinois requires programs to send at least one representative to each required training/event through [Litmos](#) or [On3Learn](#). Programs should reach out to their assigned officer for any specific training requests. IDHS-Serve Illinois provides advance notice of meetings. Meetings take place via Webex or Microsoft Teams.

Program Performance Expectations

IDHS-Serve Illinois expects Illinois AmeriCorps programs to strive to be high performing and achieving. The Commission and staff of IDHS-Serve Illinois recognize that without clear expectations of what a

strong program entails, organizations may not achieve the best results. AC HQ has developed expectations as outlined below around certain program management indicators.

IDHS-Serve Illinois uses these expectations as part of their overall monitoring strategy. IDHS-Serve Illinois is committed to addressing challenges by working with subgrantees to find adequate technical assistance to meet their needs.

Data Point	AmeriCorps Expectations
Recruitment/Enrollment Rate	100%
Retention Rate	85%
Performance measures met	All measures met
Deadline compliance	100% compliance
Monitoring visit results	Dependent on type and risk of finding
Assessed Risk Level	Low

Expectations of IDHS-Serve Illinois Staff

IDHS-Serve Illinois staff will follow the State Service Plan (SSP) as their guide in their work. This document is the Commission’s strategic plan and is updated every 3 years. Staff will consistently follow the mission and vision of IDHS-Serve Illinois, striving to propel service and volunteerism in the state. As with Illinois AmeriCorps programs, IDHS-Serve Illinois staff will be champions for National Service. They will do so through their outreach efforts and partnerships locally and nationally.

IDHS-Serve Illinois will connect programs to state and federal resources as shared and discovered. IDHS-Serve Illinois staff will be knowledgeable in all AmeriCorps, AC HQ, and IDHS-Serve Illinois rules and regulations as appropriate. They will work to discover new and innovative approaches to serve programs through new partnerships as available. In addition, when guiding programs, staff will cite the resource for programs to ensure all parties have the correct information to be successful.

IDHS-Serve Illinois’ Methods of Communication

Monthly Program Meetings

IDHS-Serve Illinois Program Officers and Program Specialists meet with each program in their assigned area on a monthly basis via Webex to talk through any questions and concerns the program may have.

Fiscal and Program Form Submittal

All fiscal communications (EDCF’s, PFR’s) come through our ILAMREPORTING mailbox. Program related documents (PPRs, MSAs, etc.) are sent to the Program Officers at DHS.ILAmeriCorpsPO@illinois.gov mailbox.

Basecamp

Basecamp is a public forum created through Americas Service Commission. It provides a website for Commissioners, Commission staff and AmeriCorps Programs to communicate, ask questions and locate information as well as interact to share relevant rules and updates regarding all things AmeriCorps.

PART THREE

Program Responsibilities

Program Design and Management

Every AmeriCorps Program starts with a program design that supports the Theory of Change (TOC) and Logic Model (LM) and instructions can be found in the NOFO or the AmeriCorps website. All member activities should be in alignment with the approved program design and include evidence for the approach and interventions. Programs are responsible for knowing their own grant and program objectives as a first step in effective program management.

The Commission values strong program management and believes program staff know their communities and organizations best. Compliance is ensured through continued training/technical assistance, sample templates and monitoring. It is the responsibility of the program to take advantage of those tools and ensure they are compliant with their own program needs, organization policies and procedures, the AmeriCorps Terms and Conditions, federal rules/regulations, and IDHS-Serve Illinois requirements.

For any questions related to the information below, please contact your assigned Illinois AmeriCorps Program Officer.

Staffing the AmeriCorps Program

Grantees must ensure adequate staffing levels for their AmeriCorps grant. Every grantee must designate contacts for IDHS-Serve Illinois regarding all aspects of AmeriCorps operations. IDHS-Serve Illinois recommends that all new programs provide for a full-time lead staff or equivalent in their first year of operations, as the responsibilities of both developing new program forms/policies and implementing them are very rigorous in year one. Most successful programs make use of a team-based management model, with additional staff (who may be full-time or part-time on the grant) specializing in areas such as member management, data tracking and reporting, host site recruitment and support, and/or member records management.

Reporting

Reporting to IDHS-Serve Illinois must be:

- On time (according to due dates and deadlines established by IDHS-Serve Illinois)
- Fully supported by source documentation (federal share and match/grantee share)
- By grant year (not agency fiscal year, state/federal fiscal year, or calendar year)
- Based on actual expenditures, not budgeted or estimated amounts. Claims must not be rounded.
- Accurate and directly from the agency's general ledger/financial records.
- Consistent based on a cash or accrual basis. Such documentation shall be retained for audit purposes.

All costs reported on reimbursement claims and financial reports must be:

- Necessary for achievement of the AmeriCorps goals and activities
- Described within the approved grant application or budget narrative
- Adequately supported by source documentation on file and
- Traceable to the organization's financial records.

As required by the Federal Regulations and/or Office of Management and Budget (OMB) Uniform Guidance, AmeriCorps grant funds must be segregated from other organization expenses and tracked

by grant year in the financial system. Separation by organization fiscal year or calendar year does not satisfy the AmeriCorps funding requirements. [2 CFR 200.302(b)]

Periodic Performance Reports

IDHS-Serve Illinois and AmeriCorps National requires Periodic Performance Reports (PPR).

These reports are due on a quarterly basis with a final report submitted at the end of the actual program year. Providers submit five PPRs total by the end of the program year. Refer to the guidance on completing PPR reports for instructions and more information.

Continuation PPR Report Due Dates:

Quarter 1-October 30

Quarter 2-January 29

Quarter 3-April 29

Quarter 4-July 30

Final-July 30

Continuance PPR Report Due Dates:

Quarter 1-October 30

Continuance Final-October 30

PY24 eGrants Final: October 30

Form:	Sent to:
Periodic Performance Report	DHS.ILAmeriCorpsPO@illinois.gov

This report includes information on: progress toward performance measures, Member and volunteer hours, program challenges, and any program changes.

The Periodic Performance Report is built from several components including in My AmeriCorps. Note the following:

Data Category:	Data Point:	Source:
Member Data	Enrollment Exit Time Logs	My AmeriCorps My AmeriCorps Member timesheets
Performance Measures	Data collected by the programs	Reported to IDHS-Serve Illinois via a semi-annual form
Accomplishments and Challenges	Narrative	Reported to IDHS via regular communication with programs

Performance Measures Instructions - Final Reports

Programs completing the final year of their three-year grant cycle must submit a Final Project Report in addition to their Progress Report due October 31 of each year. A Final Progress Report is a cumulative report covering the entire project period. This report is due by the date determined by BVCS (most likely January 20th) following the end of the three-year grant cycle and should include a three-page,

double-spaced summary of the qualitative accomplishments that the AmeriCorps grant has made for the duration of the grant period. Include a discussion of the impacts of any special initiatives that fall within this grant. Discuss what exists now in the communities that are served that did not exist prior to the grant. Use of quantitative data to support the impact statements is encouraged.

Expenditure and Documentation Certification Forms

All EDCF and are due timely by the 15th of every month. The Periodic Financial Report is due at the same date of the quarterly EDCF.

Report:	Send to:
Expenditure Documentation Certification Documentation and Periodic Financial Report	DHS.ILAMREPORTING@illinois.gov

National Days of Service Requirements

All programs must complete a **National Service Opening Day activity no later than six weeks after your program start date**. This is a time to celebrate the beginning of a new National Service year, reflect, and share your vision for the year with new and returning members. As a part of your National Service Opening Day, your members must take the AmeriCorps Pledge. Please see the National Service Opening Day Resource Document for more information.

- Proposal: At least 2 weeks before your Opening Day. [2024-2025 AmeriCorps Opening Day Project Proposal](#)
- Report: No later than two weeks after your Opening Day. [2024-2025 AmeriCorps Opening Day Project Report Form](#)

National Service Deadline Extension Request Form

All National Days of Service activities should be completed one week before the day of service up until the Sunday of the week of the service day. This form should be filled out when you are unable to complete the National Service activities by the due date. This form is only to be used for National Service activities. When you fill out this form, please notify your program officer and copy cecilia.maciel@illinois.gov and jacob.jenkins2@illinois.gov on the email.

Please allow three to five business days to process your deadline extension request and ensure a detailed explanation of this request. Proposal and report forms are still required for the day of service even if programs are submitting an extension for the day of service. [Illinois AmeriCorps National Service Deadline Extension Request Form](#)

National Days of Service

IDHS-Serve Illinois has six National Days of Service from which programs may select. National Days of Service are celebrated each year and are part of a National Service celebration and awareness across the nation. They provide opportunities to bring visibility and recognition to programs and ways to engage Members and volunteers in unique and creative service projects in the community. They are also a great time to promote programs, volunteerism, and recruit Members. Guidance for participation in the individual days is provided by AmeriCorps and/or the Serve Illinois Commission.

Choosing Your Days of Service

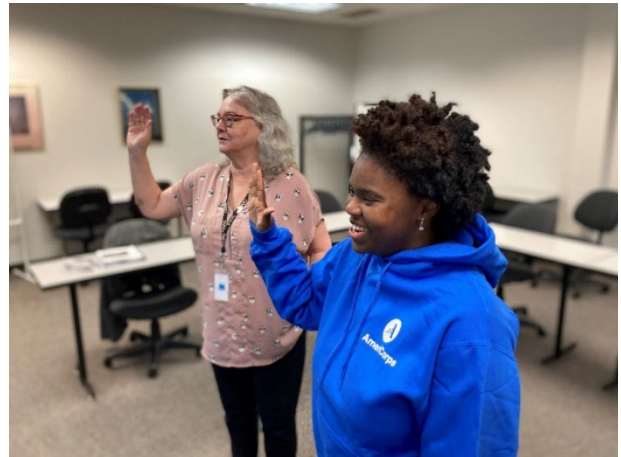
All programs must complete two National Days of Service by hosting or co-hosting an event. You have until the Sunday after the National Day of Service to complete your project. **All Illinois AmeriCorps programs must host or co-host an event for Dr. Martin Luther King Jr. Day. Below is a list of options for your second required day of service.**

- **9/11 Day of Service** September 11th National Day of Service and Remembrance is the culmination of efforts, originally launched in 2002 that promotes service on 9/11 as an annual and forward-looking tribute to the 9/11 victims, survivors, and those who rose in service in response to the attacks. Go to [9/11 Day](#) for more information regarding events.
- **Veterans Day:** Veteran's Day is a day of service created to thank service men and women, our veterans, and their families. People all over the great state of Illinois will spend the day engaged in volunteer service projects focused on benefiting our heroes! To learn more please visit: [Veterans Day - U.S. Department of Veterans Affairs \(va.gov\)](#)
- **National Volunteer Week:** The purpose of this week is to recognize and celebrate the efforts of volunteers. To learn more, please visit: [National Volunteer Week - Points of Light](#)
- **Global Youth Service Day** Global Youth Service Day (GYSD), originally National Youth Service Day in the United States, is a coordinated annual event that gathers young people around the world to conduct service projects, service learning, and youth voice activities at their communities, countries, and the world. Activities are organized in more than 100 countries each April to help mark the celebrations and engage millions, making it the largest annual celebration of young volunteers. GYSD is usually observed on a weekend in April, beginning on Friday and ending on Sunday. To learn more, please visit: [Youth Service America](#)
- **Memorial Day** is the time when we honor those who have died in the nation's wars. It originated during the [American Civil War](#) when citizens placed flowers on the graves of those who had been killed in battle. A large observance, primarily involving African Americans, took place in May 1865 in Charleston, South Carolina. Columbus, Mississippi, held a formal observance of the dead in 1866.
- **Juneteenth:** On June 19, 1865, about two months after the Confederate general Robert E. Lee surrendered at Appomattox, Va., Gordon Granger, a Union general, arrived in Galveston, Texas, to inform enslaved African Americans of their freedom and that the Civil War had ended. General Granger's announcement put into effect the Emancipation Proclamation, which had been issued nearly two and a half years earlier, on Jan. 1, 1863, by President Abraham Lincoln. The holiday is also called "Juneteenth Independence Day," "Freedom Day" or "Emancipation Day." To learn more please visit: [Juneteenth | National Museum of African American History and Culture \(si.edu\)](#)

IMPORTANT NOTE: Serve Illinois requires all programs to register the events they will be holding associated with each day of service, as well as report actual numbers based on those events. Registration and reporting due dates for the 2024-2025 year are below.

Don't Forget to Take Pictures! Your report will have a Dropbox where you can share pictures from your event.

- Please ensure all submitted images are clear and well-lit.
- Please ensure all branded items, including clothing, use the approved AmeriCorps logo.
- Please ensure all submitted images are orientated facing forward, and not angled to the left or the right.



Proposal and Report Links and Due Dates

- **9/11 Day**
 - Proposal: August 28, 2024: [9/11 Project Proposal Form](#)
 - *A proposal is not required if you are using the 9/11 Meal Packing Event as your project.*
 - Report: September 25, 2024: [9/11 Project Report Form](#)
- **Veteran's Day**
 - Proposal: October 11, 2024: [Veterans Day Project Proposal Form](#)
 - Report: November 25, 2024: [Veterans Day Project Report Form](#)
- **MLK Day**
 - Proposal: December 13, 2024: [MLK Jr. Project Proposal Form](#)
 - Report: February 3, 2025: [MLK Jr. Project Report Form](#)
- **AmeriCorps Week**
 - Proposal: No proposal is required.
 - Report: March 24, 2025: [AmeriCorps Week Project Report Form](#)
- **National Volunteer Week**
 - Proposal: March 20, 2025: [National Volunteer Week Project Proposal Form](#)
 - Report: May 9, 2025: [National Volunteer Week Project Report Form](#)
- **Memorial Day**
 - Proposal: April 25, 2025: [Memorial Day Project Proposal Form](#)
 - Report: June 10, 2025: [Memorial Day Project Report Form](#)
- **Juneteenth**
 - Proposal: May 19, 2025: [Juneteenth Project Proposal Form](#)
 - Report: July 3, 2025: [Juneteenth Project Report Form](#)

AmeriCorps Week: Required Member Recognition Event

All Illinois AmeriCorps programs must celebrate AmeriCorps Week. This week provides the perfect opportunity for AmeriCorps Members, alums, awardees, program partners, and friends to shine a spotlight on the work done by Members—and to motivate more Americans to serve their communities. Many events are scheduled across the country. Individuals and organizations with a special interest in AmeriCorps, especially Members, programs, and alums, are encouraged to use their creativity to mark the week in any way they see fit. The choice is up to you BUT recognition must be a part of it! AmeriCorps celebrates this week on the second full week of March.

This is a requirement for all programs. For more information, visit [AmeriCorps Week](#).

National Service Summit

The Illinois National Service Summit is the annual state-wide convening of AmeriCorps members, alumni, stakeholders, and those engaged in National Service in Illinois. This event is designed to celebrate our AmeriCorps members while introducing young people to the wonderful world of National Service- most in the age range of 18-28 years.

This one-day, power-packed summit takes place in the Spring and features dynamic presenters, engaging workshops, and opportunities for networking and skills development.

While there is no minimal or mandatory number of members who are to attend, this is an IDHS-provided training, and the expectation is that all programs will send at least one representative.

Training and Technical Assistance/Professional Development

Training and Technical Assistance for IDHS-Serve Illinois AmeriCorps Programs

In order to offer program support and ensure compliance with regulations, the Commission will provide regular formal and informal training, technical assistance, and support to Illinois' AmeriCorps programs. In some cases, the Agency may require training as part of an improvement plan designed to improve program performance in the areas of grant/program, member, or financial management.

Programs have many opportunities to make their technical assistance and training needs known to the Commission – including, but not limited to, performance measure status reports in Illinois Grants, bi-annual monitoring assessment, competency self-assessment, and training evaluations conducted following IDHS-Serve Illinois training events. Based on input provided by program staff, IDHS-Serve Illinois will conduct trainings for Illinois AmeriCorps Program staff and other National Service Program staff (as allowable by AmeriCorps) throughout the year. IDHS-Serve Illinois may offer trainings or events for AmeriCorps members.

Technical Assistance

IDHS-Serve Illinois Program Director's Manual

Programs are expected to familiarize themselves with and reference the IDHS-Serve Illinois AmeriCorps Program Manual when a question arises regarding program operations. The manual helps to condense and explain information from AmeriCorps terms and conditions, regulations, AmeriCorps guidance and other sources related to operation of Illinois AmeriCorps programs. This manual also adds and explains any Illinois-specific requirements.

IDHS-Serve Illinois staff can also provide additional technical assistance to programs. The Commission encourages programs to be knowledgeable of the rules and regulations of IDHS-Serve Illinois, AC HQ, and their programs.

Before contacting IDHS-Serve Illinois for assistance, programs should review the AC HQ Terms and Conditions and the AmeriCorps Program Director's Manual for guidance. If additional questions arise, programs should then reach out to your assigned Program Officer.

In instances where a program is non-compliant, there is staff turnover, or additional technical assistance is needed, IDHS-Serve Illinois may also set up program specific technical assistance. This may be focused on an individual topic or a variety. This can be scheduled by IDHS-Serve Illinois staff or requested by a program.

Finally, IDHS-Serve Illinois may require or encourage programs to opt into a mentor or coaching program if technical assistance is needed for several programs. This program's requirements would be communicated to all programs when released. In years past the goal has been to pair newer program directors with existing directors to share knowledge and grow programs. If a Program Director would like to see this program enacted, they should contact the IDHS-Serve Illinois AmeriCorps Program officer.

Monthly AmeriCorps Webinars and/or Check in Calls

IDHS-Serve Illinois conducts monthly meetings via webinar; generally, the 3rd Wednesday of each month from 9:00 – 10:00 a.m., to keep program staff informed of current issues and provide on-going technical assistance and training. It is expected that every program will have at least one AmeriCorps program staff (not members) attend monthly. Failure to participate in IDHS-Serve Illinois meetings and calls can result in additional programmatic reporting to verify that programs have the information they need to effectively manage their AmeriCorps grant.

Basecamp

IDHS-Serve Illinois will support an online networking and resource sharing group on the Illinois AmeriCorps State Basecamp page. Request access to Basecamp from your program officer. This is an opportunity for Illinois AmeriCorps program staff to access IDHS-Serve Illinois resources, share program resources, connect through conversations, and pose questions to the field. It is also a place where event information, training dates, and other general communications can occur. IDHS-Serve Illinois staff will be a part of the conversations and information sharing; but will not monitor every conversation nor be responsible for compliance issues arising from others' posts. IDHS-Serve Illinois will also maintain grantee resources as part of Basecamp. Programs should ensure that appropriate staff have access to these resources, including fiscal staff. Resources, divided into folders by topic, can be found in the *IDHS-Serve Illinois Docs & Files* section of Basecamp. The 23-24 Program Manual and calendar will also be available in the AmeriCorps Program Management Resources file on Basecamp. If you have any questions or need clarification about something posted on Basecamp or the resource page, please contact a IDHS-Serve Illinois program officer.

Required.Program.Training

The Grantee will have at least one staff member attend or complete the following trainings (an AmeriCorps member is not an appropriate representative for these meetings):

IDHS-Serve Illinois provides several training opportunities throughout the year.

The current Program Director or their designee(s) should attend or complete all grant required trainings. These include, but are not limited to:

- Monthly program calls
- Quarterly grantee calls
- Annual Program Director Training – June (required participation)
- Financial Training throughout the year and by request
- On3Learning
 - AmeriCorps 101
 - Governing Documents and Regulations
 - AmeriCorps Prohibited, Unallowable, Allowable Activities Course for Staff
 - Developing and Integrating AmeriCorps Member Position Descriptions
 - AmeriCorps Member Eligibility
 - Member Interview and Selection
 - AmeriCorps Member Enrollment and Exit
 - AmeriCorps Member Files
- America's Service Commissions (ASC) Regional Training – Spring (participation strongly encouraged)
- AmeriCorps Litmos training

A schedule of training events will be provided to the Illinois AmeriCorps Programs as far in advance as possible. Please see the Grantee Resource Webpage on the IDHS-Serve Illinois website or on Basecamp for a calendar of scheduled trainings and dates. In addition, AmeriCorps requires an annual financial management training which is available on LITMOS. The certificate of completion must be maintained as part of the official grant records.

Other.Program.Staff.Training

Other training may be offered or required throughout the program year, based on IDHS-Serve Illinois or AmeriCorps monitoring and feedback. When relevant, IDHS-Serve Illinois welcomes the participation of site supervisors, fiscal personnel, or other staff in training. IDHS-Serve Illinois staff strives to ensure that training is useful to attendees and will make specific reference to training that are open to site supervisors. Several train-the-trainer style presentations have been developed to support programs in consistent site supervisor training. The assigned Program Officer will inform programs about available trainings and the schedule.

State.and.Regional.Conferences

The following opportunities provide volunteer organizations training on capacity building that enhance the skills of volunteer managers, staff, and volunteers. These trainings provide valuable networking opportunities as well as quality professional development opportunities. The following is a listing of those conferences and a link to more information on each. IDHS-Serve Illinois is a sponsor and part of

each of the conference planning committees; however, each event is run independently by a group of individuals. Attendance is not limited by region but intended to be a way to reach more volunteer managers where they are. Program Officers can provide programs with a schedule of events for the year.

Central Illinois Volunteerism Conference (usually in June each year)

<http://www.civconference.org/>

The Central Illinois Volunteerism Conference provides quality professional development opportunities for volunteer managers/administrators that focus on the key areas of a volunteer delivery system including personal readiness, organizational readiness, engagement of volunteers, education of volunteers, and sustainability of volunteer efforts.

Illinois Conference on Volunteer Administration

<http://www.icova.info/>

The Illinois Conference on Volunteer Administration (ICOVA) is a two-day event designed for those who supervise, manage, or otherwise lead volunteers. ICOVA offers professional development and continuing education through conference workshops and keynote speakers focusing on key areas of a volunteer delivery system. ICOVA also provides much needed networking experience with peers in the field.

Northwest Illinois Volunteerism Conference (usually in April each year)

The link for this conference is provided annually as the conference is in the planning stage.

This is the first volunteerism conference set up for the IDHS-Serve Illinois Northwest Region which includes Rockford, Freeport, the Illinois Quad Cities and all the areas between. Centrally located in Dixon, this conference was created to provide quality development opportunities and valuable networking experience for anyone who manages, motivates, or mobilizes volunteers to make a difference. Participants will enjoy networking opportunities and a broad variety of learning opportunities with workshop topics that include motivating Baby Boomers, developing meaningful volunteer opportunities, recruiting, and rewarding volunteers, understanding personality traits, and building volunteer disaster preparedness projects.

Southern Illinois Volunteerism Conference

The link for this conference is provided annually as the conference is in the planning stage.

The Southern Illinois Volunteerism Conference (SIVC) has existed for over 12 years in various forms to provide capacity-building training opportunities to enhance the skills of volunteer leaders and managers in the public, private, and particularly nonprofit, sectors and to provide professional development workshops for volunteers themselves.

Volunteerism National Conference (usually in June each year)

<http://www.volunteeringandservice.org/>

The Points of Light Conference is a global convening of nonprofit, government, business, and civic leaders who connect, collaborate, gain, and share the knowledge and resources needed to galvanize the power of people to create change. It is typically held in the summer timeframe.

Administrative Policies

Organizations should have the basic governing policies necessary to comply with federal requirements and adequately manage federal funds. This includes policies that cover financial management and internal controls, human resource management, including timekeeping and travel, and policies that cover ethics, code of conduct and whistleblowers. Requirements for fiscal policies are covered in the 2 CFR Part 200 and will be discussed in Part Seven, Financial Management section of this manual. Other required administrative policies are detailed in AmeriCorps regulations, statutes, policy or other federal statutes and detailed in this or other sections of this manual.

The following policies are required either by statute, regulation, Executive Order, Grant Terms and Conditions or the Grant Certification and Assurances. You must develop policies that meet the requirements established in the source (i.e., statute, regulation, etc.). IDHS-Serve Illinois has templates available on the Basecamp site for your adaptation.

- 1. Non-Discrimination and Harassment and public notice/posting**
Requirements at: [§§ 175 and 176\(f\) of the NCSA](#), [45 CFR § 2540](#), [45 CFR § 2522.100\(f\)](#), General Terms and Conditions, Section III.M.
- 2. Limited English Proficiency**
Requirements at: [Executive Order 13166](#); [67 FR 64604](#); [Title VI, Civil Rights Act](#) and AmeriCorps General Terms and Conditions, Section III.M.2
- 3. Whistleblower Protections**
Requirements at: [5 U.S.C. §1201](#), and [5 U.S.C. §101](#), and AmeriCorps General Terms and Conditions, Section III.J, [5 ILCS 430/15-5](#)
- 4. Drug Free Workplace**
Requirements at: AmeriCorps Grant Certifications, Section 184 of the NCSA ([42 U.S.C. 12644](#)), sections 5150-5160 of the Drug-Free Workplace Act of 1988 ([41 U.S.C. 8101-8106](#)); [2 CFR Part 2245](#))
- 5. Reasonable accommodation/Disability inclusion**
Requirements at: Rehabilitation Act of 1973, Sections 504, 508; [45 CFR § 1203](#), [45 CFR § 1232](#), AmeriCorps General Terms and Conditions Section IV.F
- 6. Grievance procedure**
Requirements at: [42 U.S.C. 12636](#) and [45 C.F.R. 2540.230](#)
- 7. Personally Identifiable Information**
Requirements at: [2 CFR § 200.303\(e\)](#) and AmeriCorps General Terms and Conditions Section III.V.
- 8. Prohibited Use of Funds and Activities**
Requirements at: sections 132A and 174 of the NCSA (42 U.S.C. §§ 12584a and 12634) , [45 CFR § 2520.65](#), [45 § CFR 2540.100](#) AmeriCorps General Terms and Conditions Section III.E and AmeriCorps Specific Terms and Conditions Section V.C.
- 9. Recognition of Federal Support/Identification of funding**
Requirements at: AmeriCorps General Terms and Conditions, Sections III.H and III.M
- 10. National Service Criminal History Check**
Requirements at: 42 U.S.C. § 12645g, [45 CFR §2540.200 through §2540.207](#).
National Service Criminal History Checks (NSCHC) is a baseline screening requirement established by law to protect the beneficiaries of national service. While the statute and

regulations do not require a formal written policy, subgrantees are strongly encouraged to do so.

You can find out more about the NSCHC requirements in Part Six of this manual.

Signatory Authority

IDHS-Serve Illinois requires all programs to submit a signatory authority form annually. IDHS-Serve Illinois communicates due dates for this form on the annual calendar and sends out a reminder with the template prior to that due date.

Programs who have no changes in their signatory authority may note this when the request for submission is sent out. This form denotes which individuals at the organization have authority to sign which documents for the program and fiscal management. It is important for programs to understand this authority and update IDHS-Serve Illinois if staff responsibilities change throughout the year.

Definitions:

Authorized signatory: denotes an individual or individuals designated by the board of directors to execute agreements, contracts, and other AmeriCorps State related documentation.

Board of directors: refers to a legally organized body with oversight of a subgrantee's fiscal and organizational responsibilities.

Subgrantee: means the host organization with legal and fiscal responsibilities for an AmeriCorps State formula or competitive program and its members.

Service Site: means the partner organization hosting AmeriCorps members. A partner organization must have legal status as a state or local government, an Indian Tribe, a non-profit organization (religious organizations are permissible), or an educational institution and provide one or more types of eligible programs.

Authorized Signatory:

It is the responsibility of the subgrantee organization to determine which individual or individuals may execute one or more of the following AmeriCorps State documents:

- State grant agreement
- Member contracts
- Member-related forms
- Program application
- Program management forms
- Quarterly Progress Reports
- Financial Status Reports (FSR)
- Grant closeout package
- Request for reimbursement
- Service site agreement(s)
- Correspondence
- Other requests or documentation

The subgrantee organization should complete the Subgrantee Signatory Authority Form at the commencement of each program year. It is the responsibility of the subgrantee organization to revise the above-referenced form and return it to IDHS-Serve Illinois if a change or changes occur on the original or revised form filed with IDHS-Serve Illinois.

The subgrantee organization should authorize one (1) primary and a minimum of one (1), but not more than two (2), secondary signatories

Host Site and Supervisor Management

Site Management

Whether an AmeriCorps program places all members internally or coordinates with external partners for some or all its positions, every AmeriCorps program director will likely work with multiple host site supervisors who provide much of the day-to-day oversight of the AmeriCorps members. AmeriCorps members are placed at host sites to provide direct service to the community. Regardless of the program design, communication between the AmeriCorps program and the host sites will be key. The program staff will need to be successful in communicating with all site supervisors – regardless of the placement. Illinois AmeriCorps programs that utilize external host sites for placement of AmeriCorps members should ensure that they are effectively managing these partnerships through written agreements that support overall program goals, quality member experiences, and performance measures. Even programs with only internal placements should make use of an agreement to outline site supervisor roles and responsibilities. Illinois AmeriCorps programs are expected to monitor all site placements for compliance and to provide technical assistance and support to continuously improve host site management. There are checklists and samples of tools and forms available on Basecamp that can be used to assist programs in this process.

Written Host Site Agreement

All programs must have a written host site agreement in which both parties attest to their roles and responsibilities in the partnership. At a minimum, the agreement should cover the responsibilities of the site supervisor related to program identification, member oversight, evaluation and training, the member activities that are prohibited, the disciplinary procedures and the role of the supervisor in member discipline and termination, and financial obligations on the part of the site (including when and under what circumstances these obligations would terminate or be reduced). Programs should also collect a list of physical service site addresses as part of each Host Site Agreement (HSA). Host site supervisors that are staff of other organizations are contractors. Their roles and responsibilities should be detailed as such in the host site agreement. These agreements will be reviewed and reissued on at least an annual basis and revised as needed. As part of renewal process programs could add “program performance and review criteria” to allow for past performance, and input from staff that worked with the site to be considered. Depending on the scope and nature of the project additional items may be covered in the written site agreement. The Host Site Agreement template is available on Basecamp. Please use this form to ensure that the program’s site agreement contains the necessary information. If a program enters into a host site agreement with an entity, then the agreement must be submitted to their program officer via DHS.ILAmeriCorpsPO@illinois.gov for review prior to moving forward.

Site Recruitment and Selection

Illinois AmeriCorps programs should seek member host sites that allow them to achieve the program performance measures, to give AmeriCorps members a transformative service experience, and to carry out the activities described in the approved grant application. Illinois AmeriCorps programs are encouraged to utilize a competitive site selection process. Programs must ensure that site selection incorporates the criteria required by regulations (quality, innovation, sustainability, quality of leadership, past performance, and community involvement). In alignment with agreements with surrounding state Commissions, service sites must be no more than 40 miles from the Illinois border. If a program is considering an out-of-state host site or service site, please discuss with IDHS-Serve

Illinois prior to moving forward with grant activities, including member recruitment and selection. After host sites are selected, programs are required to enter them, including their physical addresses, into eGrants within 30 days of member enrollment.

Training and Development

At a minimum, Illinois AmeriCorps programs must provide all site supervisors with an initial orientation and annual training. The orientation for new sites must cover:

- Overview of AmeriCorps and IDHS-Serve Illinois
- Member Rights and Responsibilities
- Review of the Host Site Agreement Highlights for Site Supervisor and Member Service Agreement
- Sexual Harassment and non-discrimination
- AmeriCorps prohibited activities,
- Nonduplication/Non-displacement,
- Branding and Media inquires
- Member timekeeping system (i.e., OnCorps) and supervisor role,
- Plan for collecting performance measure and other data from the site and the site's role in collecting that data,
- Site performance and program feedback and evaluation opportunities
- Diversity, Equity, and Inclusion
- eCourses through [On3Learn](#)
- [Basecamp](#)

Programs will also need to cover relevant issues related to the financial agreement between the site and program, such as requirements for documenting site supervisor time as match to the AmeriCorps grant. Ideally, this training should be conducted before the members' start date; however, sometimes this is not possible. These topics should be covered as quickly as possible to ensure the grant year gets off to a strong start.

Host sites will play a major role in the program achieving its performance measures. It is essential that the AmeriCorps program staff focus on the program's performance measures during the site supervisor orientation/training to make sure that site supervisors know what the desired program outcomes are in the approved grant application, what the site's role is in data collection for those outcomes, and how to know if the program is on track to accomplish outcomes. Additionally, site supervisors should know their responsibility in ensuring that AmeriCorps members know their role in both achieving performance measures and collecting data for reporting on the outcomes and cover these topics during the members' orientation and training.

Each year, training should be provided to cover updates to federal, state, and program processes and requirements. Program staff should also be available to provide technical assistance on an ongoing basis, as needed. A "best practice" for programs is to build from program experience and site feedback to develop and implement an ongoing training plan for the host sites and have regular communication with each site.

Managing Site Supervisor and Contractor Time

Programs using site supervisor and/or contractor time as match or that are supporting time with federal funds need to provide training to site supervisors/contractors. Training should include how to document time and explanation of appropriate activities that can be counted toward the grant. Site supervisors, employed by the program's organization, should use the organization's timekeeping system.

Contractors, site supervisors who are employed by another organization, should create an invoice that includes the date and the number of hours worked and the activities that time was spent on for the AmeriCorps project for each pay period. If a generic spreadsheet or other document is used to communicate time spent, signatures are required. In addition to the time sheets, programs using contractor time should collect the salary and benefit cost for each person annually. This document should be updated if there is a new salary or budget amount during the grant year. From this information programs can determine an hourly rate. The total number of hours would be multiplied by their hourly rate to calculate the total amount included on each claim.

Hours in which the site supervisor is doing their work alongside the member(s) does not count as site supervision. Only time in which the supervisor is providing instruction, guidance, feedback, recruiting/interviewing potential members, data collection, or reporting directly to or related to the member should be counted.

Site Monitoring and Opportunities for Feedback

For continuous improvement and to maximize the mutually beneficial relationship between the organization and its sites, Illinois AmeriCorps programs are required to conduct regular site monitoring.

Monitoring is also required to ensure that host sites are upholding the standards required of any Illinois AmeriCorps State program, such as being accessible to individuals with disabilities and providing members with quality member experiences.

IDHS-Serve Illinois strongly suggests programs monitor and assess each host site annually. On-site monitoring also provides the program with the opportunity to see the AmeriCorps members' service first-hand, to learn about successes and challenges, and to be able to look at the service partners in the big picture. Some goals for on-site monitoring include ensuring members are doing the activities the host site has agreed to, as well as providing needed support and guidance to sites that may need timely support. Different monitoring processes may work well for different program designs but may include interviews or focus groups with members and site supervisors, gathering feedback from community partners, review of site performance and progress towards goals, review of member recruitment and retention at the site, and/or in-person site visits. While any of these processes may be used, in-person visits do offer the program a chance to get a feel for the member experience at the host site and the community the program is serving. Host sites should also be frequently given the opportunity to provide feedback to the program regarding successes and challenges with the host site-grantee relationship.

Other Program Management Responsibilities

Please contact your assigned Program Officer with any questions.

AmeriCorps Branding

As recipients of federal agency AmeriCorps assistance or resources, IDHS-Serve Illinois and its subrecipients must identify their programs, projects, or initiatives as AmeriCorps programs accordingly. All IDHS-Serve Illinois agreements with subrecipients and all subrecipients' agreements with operating sites, or service locations, related to AmeriCorps programs and initiatives explicitly state that the program is an AmeriCorps program. Similarly, all national service members serving at their programs, projects, or initiatives as either AmeriCorps members.

Visual Representations and Prominent Display.

IDHS-Serve Illinois and its subrecipients must identify their programs, projects, or initiatives, and their members or volunteers, through the use of visual representations, including logos; insignias; written acknowledgements, publications and other written materials; websites and social media platforms; and service gear such as clothing. All visual representations must follow current AmeriCorps branding guidelines, which include proper logo use and cobranding requirements.

To provide recipients technical assistance in ensuring compliance with proper logo use and cobranding requirements, AmeriCorps provides brand guidelines, to which IDHS-Serve Illinois and subrecipients will refer and follow. The brand guidelines are available at [Branding Guidelines](#). IDHS-Serve Illinois and subrecipient websites and social media communications shall clearly state, as appropriate, that they are an AmeriCorps recipient or funded by a grant from AmeriCorps and shall prominently display the AmeriCorps logo. Logo graphics should be embedded with a link back to the AmeriCorps.gov home page (referral link) or to an AmeriCorps program specific web page at AmeriCorps.gov. IDHS-Serve Illinois and subrecipients shall prominently display the AmeriCorps name and logo on all service gear and public materials, in accordance with AmeriCorps' requirements. Public materials are defined in the branding toolkit.

Acknowledgement and Disclaimer on Published Materials

The appropriate AmeriCorps logo shall be included in publications related to an award of AmeriCorps assistance or resources. An acknowledgement and disclaimer shall be displayed on all reports and other published materials based upon work supported by the award. The acknowledgement and disclaimer may contain language the same as or similar to: "This material is based upon work supported by AmeriCorps under (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, or a position that is endorsed by, AmeriCorps."

Service Gear

All AmeriCorps Members MUST wear service gear that includes the AmeriCorps logo at all times that they are logging hours. This gear can include, but is not limited to:

- Shirts
- Hats
- Lanyards
- Lapel Pins
- Jackets

AmeriCorps.Members

AmeriCorps members should be referred to as AmeriCorps Members regardless of the program they serve in. They may have additional titles such as “coaches”, but they should be referred to first as AmeriCorps Members. AmeriCorps Members are not employees.

Members should be reminded that service gear should not be worn on personal time when it would appear they are conducting prohibited activities. This would include, but not be limited to adult establishments, political rallies, or protests.

Service.Site.Signage

All locations where Members serve should note that service with signage. This could include banners, window clings, lawn signs, etc. IDHS-Serve Illinois recognizes that some service sites may not allow signage, but every effort should be made to note that AmeriCorps Members are serving at the location.

Website.Branding.

The program’s forward-facing websites and social media platforms must include both the IDHS-Serve Illinois and AmeriCorps logos, and the program must note that is funded in part by the IDHS-Serve Illinois Commission and AmeriCorps.

Media.Releases.and.Marketing.Materials

Any media releases or marketing materials should note that the program is funded in part by the IDHS-Serve Illinois Commission and AmeriCorps, and should include, if possible, the IDHS-Serve Illinois and AmeriCorps logos. All materials should be sent to your Program Officer for their records and to assist IDHS-Serve Illinois in amplifying your marketing messages.

Cost.of.Branding.Materials

Grant funds may be used to purchase service gear and signage. Members should be provided with enough gear to meet the requirements above.

[National Service Gear](#) is the official provider of AmeriCorps gear and signage, however the program may use any vendor that they find reasonable and cost effective.

PART FOUR

Member Management

Member Recruitment

A successful recruitment strategy is the foundation for a thriving AmeriCorps program. The individuals you select and place within the community represent your program every day; their interactions either enhance or detract from your organization's reputation.

IDHS-Serve Illinois AmeriCorps Programs must actively seek to recruit Members from the community in which the project is conducted.

All position descriptions must be posted in the Portal through the [eGrants system](#) and all applicants must eventually apply through My AmeriCorps Portal system. The My AmeriCorps portal is the official system of record for AmeriCorps member service and is the system through which Members access their Education Award, request loan forbearance and interest accrual payments.

IDHS-Serve Illinois recommends that programs utilize other recruitment methods (online, print, etc.) in addition to the My AmeriCorps Portal.

Membership should be diverse in terms of race and ethnicity, socioeconomic backgrounds, education levels, gender identities, sexual orientation, and abilities, unless and to the extent that the approved program design requires emphasizing the recruitment of staff and Members who share a specific characteristic or background. However, in no case may you violate the nondiscrimination and non-displacement rules governing participant selection.

AmeriCorps has set standards for both Member recruitment and Member retention percentages. IDHS-Serve Illinois will review both regularly to ensure compliance. If a program fails to meet either requirement, it may result in reduced funding or termination of the grant.

Member Eligibility

General Eligibility Requirements to Serve

The program is responsible for following AmeriCorps' eligibility requirements for members, namely that they must:

- (1) Be at least 17 years of age at the commencement of service OR be an out-of-school youth of at least 16 years of age participating in a youth corps-type program [42 U.S.C. § 12572 (a)(2)] OR an out-of-school youth of at least 16 years of age enrolled in a program for economically disadvantaged youth (as defined in the Act 42 U.S.C. §12572(a)(9));
- (2) Have a high school diploma or its equivalent, agrees to obtain a high school diploma or its equivalent (unless this requirement is waived based on an individual education assessment conducted by the program) and the individual did not drop out of an elementary or secondary school to enroll in the program, or is enrolled in an institution of higher education on an ability to benefit basis and is considered eligible for funds under 20 U.S.C. § 1091; and
- (3) Be a citizen, national, or lawful permanent resident alien of the United States. Individuals who do not meet these criteria are not eligible to serve and should not be enrolled or considered as a member.

Identification and Member Age Eligibility Documentation

For the purposes of AmeriCorps eligibility, the identification of the member must be verified by the program at the time of member enrollment using a government-issued form of identification, such as a

driver's license or passport. The program's policies should outline acceptable and preferred forms of identification. The identification provides documentation of member eligibility in terms of age requirements. Checking the individual's government-issued identification also helps you to ensure that the individual is who she/he claims to be. This is particularly important when you run the required criminal history checks using the correct name, date of birth, etc. (see more under National Service Criminal History Checks, Part Six of this manual). A copy of this document must be retained by the program in the member's file or electronically (in a manner that meets the AmeriCorps' electronic storage requirements).

Prior Service Term Limits and Education Award Eligibility

Individuals may serve multiple terms of AmeriCorps service, but members who have served prior terms in AmeriCorps State and National (ASN) must meet certain performance and disclosure requirements to be eligible for subsequent terms. If an applicant was exited for cause from a prior term, he/she must disclose this fact at the time of application to serve a subsequent term. The member must have received a satisfactory performance review from any prior terms or service; if not, he/she is not eligible to serve again. The MyAmeriCorps Portal does not automatically notify programs of members who have previously received unsatisfactory performance reviews, nor does it disqualify them from applying for future terms of service. **Therefore, it is the responsibility of the program to take reasonable steps to determine the status of the member's exit from a previous program so that it does not select someone who is ineligible for continued service.** For members who have served multiple prior terms of service, programs only need to check the most recently completed term of service for satisfactory completion but are strongly encouraged to contact the additional prior service sites.

Each branch of AmeriCorps does have term limits. Members may serve up to four (4) terms in AmeriCorps State and National. However, they may only earn up to the value of two (2) full-time education awards from any national service branch. Members who have already earned the maximum education award value (through AmeriCorps State and National or through the other branches of AmeriCorps), but who have not served the maximum number of terms may still enroll in subsequent terms of service with AmeriCorps State and National; however, the end of service benefit they earn will have no value (i.e., the education award they can earn is worth \$0).

Programs should consult with members on how many previous AmeriCorps State and National terms they have served to ensure they do not exceed the limits for AmeriCorps State and National. Members that exit a term of service early for reasons other than misconduct prior to completing 15% of a term of service will not have that service term counted towards their term limit. Programs and members will see the aggregate value of an individual member's education awards earned to date in the eGrants/MyAmeriCorps Portal. Members eligible for only a partial education award must acknowledge this in the Portal before they may be enrolled.

Members without a High School Diploma or GED

To participate in AmeriCorps, an individual must meet certain education requirements. If members self-certify that they have a high school diploma or GED, they meet the requirement with no additional documentation required.

If a member does not have a high school diploma or its equivalent at the time of enrollment, the program must ensure that the person did not drop out of school to enroll in the AmeriCorps program. The program must obtain the member's written agreement to obtain a high school diploma or its

equivalent before using the education award unless this requirement is waived based on an individual education assessment conducted by the program.

If the member has been determined to be incapable of obtaining a high school diploma or its equivalent, the program must request a waiver from the AmeriCorps to the diploma/GED requirement. The program must provide an independent evaluation demonstrating the member's inability to meet this requirement as part of its waiver request. The program must retain a copy of the approved waiver and the supporting independent evaluation.

Or, if the applicant does not fall into any of the above categories, he/she is considered eligible for AmeriCorps service if the program has verification of the member's enrollment at an institution of higher education on an ability to benefit basis and eligibility for funds under section 484 of the Higher Education Act of 1965 (20 U.S.C. 1091).

Citizenship Eligibility Documentation and Social Security Verification

Program staff should pay special attention to the requirement that members are citizens, nationals or lawful permanent residents of the United States and have a valid social security number associated with the same member's name. Members must have citizenship and SSN verifications through the MyAmeriCorps portal (see next paragraph) or manual verifications dated on or before the member's enrollment start date; therefore, programs should review their enrollment timelines and processes to allow for collection and review of these documents.

AmeriCorps utilizes an automatic, electronic verification process to satisfy this requirement. The process begins at the time the member completes and submits their AmeriCorps member enrollment form in the Portal. **Therefore, it is VERY important that the prospective member enter their social security number accurately and use their name as it appears on their social security card.** If there are discrepancies as to how the name is listed on various forms of identification, it has found that using the name as listed on the social security card may be preferable.

Upon submission of the member enrollment form, the prospective member's citizenship information will be sent electronically to the Social Security Administration and the Department of Homeland Security for verification. This process means that members must also have a valid social security number. Upon successful verification, the individual's citizenship status will appear as "verified" in the Portal and will be visible to both the member and the program staff. Members who have served previous terms, prior to the enactment of the automatic verification, will appear as "previously served" or display the previously verified/manually verified date. Further action may be required by the program even if the member's citizenship status is listed as previously served. No further action should be required by the program if the member's citizenship status is listed as verified/manually verified for a previous term.

If the individual's information cannot be automatically verified, AmeriCorps will contact the program by email to request that additional documentation to support the member's social security and/or citizenship status be submitted to AmeriCorps via electronic file transfer for review and verification as soon as possible. The individual's status will appear as "returned" in the Portal. The email will contain information about the documentation to be submitted. In general, the program should be prepared to provide a copy of a social security card, and one of the following forms of documentation:

- a) a legal permanent resident card (also known as a green card)

- b) a U.S. birth certificate
- c) a U.S. Passport (expired or current), or
- d) a U.S. citizen certificate

The program must maintain copies, in the member's file, of any citizenship verification documentation that was obtained, submitted, and reviewed by AmeriCorps. Programs must save a copy/screenshot of the member record from eGrants showing the status as verified and keep the documentation in the member's file.

The program will not be able to complete the enrollment process in eGrants until the citizenship documentation and social security number is verified by AmeriCorps. Programs may allow members to start while their verification is in its "returned" status, as long as the program is confident they have the documentation needed to verify eligibility. Once the citizenship status or social security number is manually verified, the manual verification effective date will be the same date that the status was returned to the program and then the enrollment process can be completed in eGrants. Programs should still plan pre-enrollment steps to occur in a timeframe that will allow programs to enroll members within eight (8) days of their start date. Costs for members that are not eligible are subject to disallowance and repayment.

Enrollment Documentation

Programs must be able to document that every member is eligible to enroll in AmeriCorps, ensure members have adequate time to complete their terms of service, and receive in-service and post-service benefits. Programs must enroll and exit members with a completely electronic process managed in the Portal. All member files must contain a hard copy or screenshot of verification of the member's electronic enrollment from the eGrants/MyAmeriCorps Portal. eGrants is the access point to the Portal for program staff and this is the official system of record for AmeriCorps. **Member enrollment data must be entered into the My AmeriCorps Portal ("Portal") within 8 days of the member's service start date.**

All enrolled members must also be assigned to a service location with the eGrants/MyAmeriCorps Portal. This must be completed within 30 days of their enrollment. All service locations should be described by name, full address and/or ZIP code plus four. Members serving at multiple sites should be assigned to the location where they serve a plurality of their hours.

Programs are required to certify completion of certain National Service Criminal History Check (NSCHC) components in eGrants as part of the enrollment process. As part of enrollment, the program must certify that:

- 1) the National Sex Offender Public Website (NSOPW) has been completed and reviewed prior to the member's start date and
- 2) that they have completed the necessary state(s) and FBI checks as appropriate.

This certification has a date box in the eGrants enrollment form, and the date entered must be no later than the day before the member's start date. Keep in mind that information entered into eGrants is considered part of a federal award and falsification of information in this system can result in civil or criminal penalties.

Programs that identify ineligible members during the NSCHC process should report these cases to IDHS-Serve Illinois immediately.

Please find more detailed instructions and information in Part Six, NSCHC of this manual.

Member Enrollment Deadline

Programs must document in the eGrants/MyAmeriCorps Portal a member’s enrollment in a term of service within 8 days of the date of that event. Suspension, completion, and release from service must be documented in the eGrants/MyAmeriCorps Portal within 30 days of the event. **Member enrollment beyond 8 days is considered noncompliant and the program must document the reason for the late enrollment. Time prior to the official eGrants enrollment will be disallowed as service and federal funds will not be eligible for reimbursement.** AmeriCorps will consider changes in the member start date if the program can document a failure of AmeriCorps’ technology platforms that prevented timely social security or citizenship verification or if the program can demonstrate other circumstances that prevented timely verification, such as a legal name change, natural disaster, or unintentional program staff error. Requests for administrative review will require supporting documentation, ideally including ticket numbers for any associated eGrants helpdesk communications. If a program desires administrative review, please contact the program officer.

Member Enrollment Periods and IDHS-Serve Illinois Requirements

Programs establish a member enrollment period in the eGrants/MyAmeriCorps portal, which may begin no earlier than the grant award date and may last up to one year. Enrollment deadlines for various member slot types are based on the amount of time such a member may reasonably need to complete his/her term and how that relates to the program’s project period. No individual member service agreement may exceed twelve (12) months, and all Illinois members (including FT, TQT, HT, RHT, QT, MT, AT) must complete their terms of service within the IDHS-Serve Illinois Grant Agreement project period.

In order to maximize resources, effectively manage programs and allow members adequate time to complete their service term, enrollment deadlines have been established for all member classifications.

Slot Type	Final Date to Enroll members Aug/Sept Start Dates
FT	October 1 st
TQT	November 1 st
HT	March 1 st
RHT	March 1 st
QT	June 1 st
MT	June 1 st
AT	June 1 st

Any requested changes must seek review from the Program Officer to determine if approval will be given.

Member Service Agreements

General Requirements for Member Service Agreements

All members must be covered by a member service agreement that is fully executed and in effect during their entire term of service. This means that the agreement must be signed and dated by both the member (and a parent/guardian for those under 18) and program representative on or before the member's first day of service. Programs should be consistent about who signs the member service agreement on behalf of the program. IDHS-Serve Illinois suggests it be someone from the grantee organization's administrative team and not the site supervisor. If a program desires the site to be represented in the member service agreement, the site supervisor or other host site representative can be an additional signer.

NOTE: All signed MSAs need to be emailed to the email listed below. [Member Service Agreement](mailto:DHS.ILAmeriCorpsPO@illinois.gov)

Any changes to the MSA require prior approval by the Program Officer. If the change is approved, the change must be initialed, signed and dated by the program representative and the member.

Form:	Sent to:
Member Service Agreement (MSA)	DHS.ILAmeriCorpsPO@illinois.gov

To receive the full living allowance and Segal Education Award, the member must satisfy both the minimum number of hours served and the dates of service as stated in the member service agreement. Programs must have a signed and dated member service agreement for each member. If there is not a completed member service agreement, all expenses must be repaid.

Changes or Amendments to Member Service Agreements

Any amendments to the Member Service Agreement must be conveyed in writing, signed, and dated by the member (and parent/guardian for members under age 18) and program representative and attached to the original Member Service Agreement. The member must also be given a copy of the amendment for their records.

Any minor changes to the member service agreement should have a line striking through the deleted language and new information written/typed in and signed and initialed by both parties to the agreement. White out or correction tape should not be used in a member service agreement. Minor changes, such as the site supervisor name may be updated using this method. As a reminder, no one, including program staff, host site staff or the member should change or alter an official AmeriCorps document without engaging all parties. This would include member service agreements, amendments to the member service agreement, host site agreements, and timesheets. This list is not exhaustive.

Only in the case of compelling personal circumstances may a member's service agreement be extended beyond the original end date, via a written and signed member service agreement extension. The program must issue a member service agreement amendment to ensure that the member is covered by a service agreement that is in effect, but the extended service period must be no longer

than 12 months. The compelling personal circumstances must be documented in the member file in a timely fashion.

Storing Member Service Agreements

Member service agreements should be located within the member files and maintained at the “headquarters” of the program, not at the site where the member is serving. The original service agreement with all original signatures (not a photocopy or faxed version) must be easily accessible on-site if stored in a separate human resources file. All member service agreements must be available for review by IDHS-Serve Illinois or AmeriCorps staff during site monitoring and/or audit visits. If the program is signing and storing documents electronically, organizational policies should support this process and storage processes should ensure document retention and Personally Identifiable Information (PII) safety.

Required components of a Member Service Agreement (MSA)

- Member name, program name, sponsor/grantee organization name
- Member position title, service location, site supervisor name and site supervisor phone/email
- Member start date and end date
- Term type member is serving, minimum required service hours to successfully complete term and be eligible for the education award.
- Expectations outlining service from start date through end date and completing minimum hours in term
- Requirements (as developed by the grantee) necessary to be eligible for additional terms of service
- Meeting background check requirements
- Living allowance amount and language that it must be paid from the start of service (start date) until the member ends service (end date) and in accordance with the program’s Member Payroll and Exit Policy
- Living allowance is paid in equal increments while members are serving
- The member is prohibited from accepting other forms of compensation for their service. This does not include program approved incentives
- Living allowance is taxable; taxes will be deducted prior to payment
- Member benefits (health care, childcare, loan forbearance /PSLF)
- Education award link to determine amount for the term of service in which the individual is enrolling
- High school diploma or equivalent certification
- Member must disclose previous service that may make them ineligible for future service and/or education award. Includes both release for cause and number of prior terms served.
- Information on the impact of an exit for compelling personal circumstance on the education award
- Member responsibility to the program as it pertains to the Drug-Free Workplace policy
- Loan forbearance and Interest Accrual information
- Prohibited Activities
- Code of conduct (standards developed by the grantee) and disciplinary policy
- Nonduplication language and non-displacement language
- Suspension and Temporary Leave from Service

- Member Exit and Release, including the specific terms under which a member may be released for cause
- Informed consent/Media/publicity/information release
- Civil Rights and Non-Harassment/Non-Discrimination Policy
- Member signature along with date of signature (signed prior to commencement of service). Please note, if the member is under 18 years of age, the agreement must be signed and dated by the member's parent or legal guardian
- Program representative signature and date
- Amendments to the agreement, with their own signatures or initials and dates
- Member Position Description
- Living Allowance Pay Schedule
- Grievance Procedures
- Drug-Free Workplace Policy
- Reasonable Accommodation Policy and Form

Programs should also add a technology/equipment use policy to the member service agreement if they intend to provide portable technological equipment (laptop, tablet, phone, etc.). A technology/equipment agreement should be instituted if a program intends to withhold living allowance, withhold the education award, or issue a fine if technology is not returned or damaged beyond regular wear and tear. If the technology was purchased with AmeriCorps grant funds or funds used as match, members must agree to only use that equipment for AmeriCorps-related activities.

Grievance Policy

The Member Service Agreement should contain the grievance policy to be used by individuals who wish to resolve disputes related to the program. Members must be suspended while grievances related to enrollments and exits are settled, please see Suspensions Related to Grievance for more information.

IDHS-Serve Illinois suggests that programs develop a form for members/applicants to use when submitting a grievance, in order to ensure that all necessary information relevant to the program decision being grieved is collected. The form must be in compliance with AmeriCorps requirements for grievance policies.

Programs should notify their IDHS-Serve Illinois program officer in writing of any pending grievance. This notice should be provided to the program officer within five (5) business days of the notification to the program. Programs must maintain documentation of grievances filed and the program's response.

Member Position Descriptions

General Requirements for Member Position Descriptions (MPD)

As stated in the Member Service Agreement (see attachments listed in Section XVI on the MSA), every member service agreement must incorporate a member position description specific to the member either (MPD) by reference or within the body of the member service agreements, Position descriptions must fully describe the duties assigned to the member. If the member position description is not incorporated into the member service agreement, then the position description must also be signed and dated by both the member and the program representative. The recipient must develop member

positions that provide meaningful service activities and performance criteria that are appropriate to the skill level of members.

The recipient is responsible for ensuring that the positions do not include or put the AmeriCorps member in a situation in which the member is at risk for engaging in any prohibited activity (see 45 CFR § 2520.65), activity that would violate the non-duplication and non-displacement requirements (see 45 CFR § 2540.100) or exceed the limitations on allowable fundraising activity (see 45 CFR §§ 2520.40-45). The recipient must accurately and completely describe the activities to be performed by each member in a position description. Position descriptions must be provided to AmeriCorps upon request. The recipient must ensure that each member has sufficient opportunity to complete the required number of hours to qualify for an education award. In planning for the member's term of service, the recipient must account for holidays and other time off and must provide each member with sufficient opportunity to make up missed hours.

Creating Compliant Member Position Descriptions

Member Position Descriptions are the tool programs use to transfer the vision in the grant into action. Ensure position descriptions align with approved program design. Each Position Description should include these components:

- Member name
- Position title
- Program name and address
- Service location
- Position purpose
- Minimum qualifications that the program has established
- Term of service – full time, half time, etc.
- Indicates that vacation, sick and holiday leave does not count toward the total hours needed to successfully complete the term of service.
- Anticipated service schedule – this should be specific both in hours and in days members are expected to serve, e.g., M-F 8:30AM-1:30PM and minimum hours per week (not a range of hours). The minimum number of hours must equal or exceed the minimum number of hours to exit successfully. Programs should consider time that members will not be serving, for example school breaks and holidays.
- Training completion requirements – participation in program orientation, site orientation, etc.
- Benefits – would include the tangible benefits like the education award, but also things like personal growth, learning new skills, etc.
- Evaluations – midterm and end of term evaluations – or other evaluation schedule
- Description of Duties

List service activities that are specific to each member. Understand that activities in which members engage but were not included within the position description may be considered noncompliant or unallowable.

- Describe all member activities explicitly to ensure that prohibited activities are not included.
- Do not include phrases like, “other duties as assigned” or similarly vague statements about member responsibilities (see Member Position Description checklist for sample language). For example, do not use the phrase, “assist Site Supervisor” or “assist employees” without

additional detail. Instead break down the project or program to specify the portion of the activity for which the member will be responsible.

- Do not use employment terms such as: “work/job, job description, hired, or employee.” Instead, the position description should use appropriate National Service terminology like, “serve/service, position description, enrolled, and member/service participant.”
- Avoid abbreviations and acronyms – Instead, spell out the terms at the first usage and then use the acronym or abbreviation later in the document only as needed.
- If a member position description includes member participation in volunteer recruitment, volunteer management or similar activities, a brief description of the potential activities for which the member will be recruiting must be added within the position description itself. For example, “Recruit and manage volunteers to support the afterschool program.”
- Consider how each service activity might be altered if a member needed a reasonable accommodation.
- Avoid listing expected behaviors as service activities, for example, “Provide a drug-free, educational, nurturing, safe, and supervised environment for youth.”

Guidance on Appropriate Service Activities

IDHS-Serve Illinois has established these guidelines to help programs determine whether proposed service activities are appropriate for an AmeriCorps State member position.

Member activities must not replace staff or community volunteer responsibilities. AmeriCorps is intended to be above-and-beyond what the individual or regular volunteers would “normally” do. For example, if the prospective member already volunteers for the same activities, this is not a member position for that person. However, if the activities are more expansive, require more time, include additional activities or in other ways are outside of the scope of what they would “normally” do, this could potentially be an appropriate member service.

Member Position Descriptions and Slot Types

Member position descriptions for each slot type must align with the approved grant activities. Programs are encouraged to include details that will distinguish responsibilities between slot types. This can be done by adding dosage and/or duration, considering seasonal difference, and determining if all slot types will be responsible for all service activities. The Position Description Breakout template can assist programs in determining whether position descriptions are unique enough to show clear differences.

AmeriCorps Service Expectations Defined

The position should be defined by AmeriCorps service expectations and not solely those established for another school or educational purpose (such as an internship or practicum). An educational institution may determine that the service also meets its own requirements for an internship or credit, but those would be defined by the other entity for its purposes. Programs are encouraged to look for opportunities in which their members’ service may provide them with certifications or credits, or to provide member training opportunities that would also provide formal recognition of skills attained. However, these activities should also be aligned with the overall goals and requirements of the AmeriCorps program.

Service Activities and Connection to the Approved Grant

Activities must be connected to the program's design, goals, and performance measures. IDHS-Serve Illinois supports programs that use a collective impact model or otherwise use a multidisciplinary approach to meet community needs. However, this aspect of the design must be clear in the approved grant application so that any prospective member activities can be shown to be in alignment with the program's identified community needs and goals. For example, a school-based program with a goal of increasing student academic performance could not enroll a member whose activities focused on improving student health and nutrition, unless they could establish a connection between this member's activities and the program's overall goals. Similarly, members whose stated role is to provide tutoring activities with no mention of other student enrichment support cannot assign those members to be involved with extracurricular activities.

Administrative Duties

Members should not serve in a primarily administrative role. For example, if a mentoring program expects its staff to maintain their client files, this responsibility should not be shifted to an AmeriCorps member who starts service at the organization. The member may be expected to maintain his/her own files, but not those of other staff. Similarly, agencies may not assign AmeriCorps members to cover the essential duties of a staff member absent temporarily (such as for maternity or medical leave).

Meaningful Service Activities

Service activities should provide positive opportunities for member growth and skill development and help develop civically engaged citizens. In addition, service activities should lead to sustainable actions for the organization. Finally, evidence of community impact should be an outcome of member service activities.

Member Service Projects and Policies

As noted in the Program Design section of the manual, while it is allowable for members to participate/lead service projects (outside of the day-to-day service activities) as part of the member position description or service activities, the program must ensure that the activities completed by the member are in alignment with the program's identified community needs and member activities as outlined in the approved grant application. In addition, the program must have a way to verify the types of projects in which the members are involved and ensure they do not include prohibited and/or unallowable activities. Generally, this will require a program policy (Days of Service/Special Projects Policy or Alternative Service policy) that includes review/approval of member service project plans and review of member service project reports. A program may approve occasional volunteer activities for a member, so long as the volunteering is occasional and related to the position, such as a one-time volunteer project. This could be considered as an authorized activity under a Teleservice policy.

Prohibited Activities

AmeriCorps has a strong emphasis on monitoring for prohibited activities, and the consequences for programs that fail to adhere to these prohibitions can be high-profile and severe. All programs should make note of the prohibited activities and ensure that members, site supervisors, and other staff are well-versed in them. It is required that prohibited activities be covered in the member and site supervisor orientation, as well as specifically detailed in

the Member Service Agreement and Host Site Agreement. Additionally, the prohibited activities should be posted at member service locations.

AmeriCorps members may not engage in prohibited activities directly or indirectly by recruiting, training, or managing others for the primary purpose of engaging in one of the activities listed below. Individuals may exercise their rights as private citizens and may participate in the activities listed below on their initiative, on non-AmeriCorps time, and using non-AmeriCorps funds. Individuals should not wear the AmeriCorps logo, nor should they identify themselves as AmeriCorps members, while doing so.

The prohibited activities include:

1. Attempting to influence legislation.
2. Organizing or engaging in protests, petitions, boycotts, or strikes.
3. Assisting, promoting, or deterring union organizing.
4. Impairing existing contracts for services or collective bargaining agreements.
5. Engaging in partisan political activities, or other activities designed to influence the outcome of an election to any public office.
6. Participating in, or endorsing, events or activities that are likely to include advocacy for or against political parties, political platforms, political candidates, proposed legislation, or elected officials.
7. 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, or engaging in any form of religious proselytization.
8. Providing a direct benefit to
 - a. a business organized for profit.
 - b. a labor union.
 - c. a partisan political organization.
 - d. a nonprofit organization that fails to comply with the restrictions contained in section 501(c)(3) of the Internal Revenue Code of 1986 except that nothing in this section shall be construed to prevent participants from engaging in advocacy activities undertaken at their own initiative; and

- e. an organization engaged in the religious activities described in paragraph vii of this section unless Corporation assistance is not used to support those religious activities.
9. AmeriCorps members may not:
- a. Raise funds for living allowances or for an organization's general (as opposed to project) operating expenses or endowment.
 - b. Write a grant application to the Corporation or to any other Federal agency.
10. Conducting a voter registration drive or using Corporation funds to conduct a voter registration drive.
11. *Providing abortion services or referrals for receipt of such services; and
12. Other such activities as AmeriCorps/ IDHS-Serve Illinois may prohibit. These include:
- a. Census activities
 - b. Election and Polling Activities
13. *Providing Abortion Services is defined by AmeriCorps as:
- a. Performing abortions.
 - b. Being present in the room during an abortion in support of the woman or the procedure.
 - c. Obtaining or providing medications to induce a medical abortion.

Referrals to Abortion Services are defined by AmeriCorps as:

1. Scheduling or arranging for an abortion-related appointment, including any pre-procedure appointment required by law to obtain an abortion.
2. Providing or organizing transportation for patients to obtain an abortion when the AmeriCorps member or assigning staff member has actual prior knowledge that the purpose of the visit is to obtain an abortion.
3. Accompanying or providing translation services for patients obtaining an abortion.
4. Providing counseling or support before or during the procedure, including explaining what the procedure will be like, explaining what is required to obtain an abortion in each state, explaining or obtaining signed abortion consent forms from clients interested in abortions, negotiating fees or insurance coverage for a particular abortion, or other activity that promotes or encourages abortion.

5. Providing information such as the name, address, website, telephone number, or other relevant factual information (such as whether the provider accepts Medicaid, etc.) about an abortion provider.
6. Promoting or encouraging use of abortion as a method of family planning.

AmeriCorps has provided the following language on additional prohibited activities:

1. **Census Activities.** AmeriCorps members and volunteers associated with AmeriCorps grants may not engage in census activities during service hours. Being a census taker during service hours is categorically prohibited. Census-related activities (e.g., promotion of the Census, education about the importance of the Census) do not align with AmeriCorps State and National objectives. What members and volunteers do on their own time is up to them, consistent with program policies about outside employment and activities.
2. **Election and Polling Activities.** AmeriCorps members may not provide services for election or polling locations or in support of such activities. AmeriCorps members may not engage in the above activities directly or indirectly by recruiting, training, or managing others for the primary purpose of engaging in one of the activities listed above. Individuals may exercise their rights as private citizens and may participate in the activities listed above on their initiative, on non-AmeriCorps time, and using non-AmeriCorps funds. Note: Individuals should not wear the AmeriCorps logo while engaging in any of the above activities on their personal time.

Member Fundraising

See **eCFR 2520.40 Under what circumstances may AmeriCorps members in my program raise resources**

The following language on member fundraising should be part of the member service agreement:

AmeriCorps members may raise resources directly in support of AmeriCorps program's service activities. Examples of fundraising activities AmeriCorps members may perform include, but are not limited to, the following:

- Seeking donations of books from companies and individuals for a program in which volunteers teach children to read;
- Writing a grant proposal to a foundation to secure resources to support the training of volunteers;
- Securing supplies and equipment from the community to enable volunteers to help build houses for low-income individuals;

- Seeking donations of books from companies and individuals for a program in which volunteers teach children to read.
- Securing financial resources from the community to assist in launching or expanding a program that provides social services to the members of the community and is delivered, in whole or in part, through the members of a community-based organization;
- Seeking donations from alumni of the program for specific service projects being performed by current members.

An AmeriCorps Member may spend no more than ten (10) percent of his or her originally agreed-upon term of service, as reflected in the member enrollment in the National Service Trust, performing fundraising activities.

Nonduplication and Non-Displacement-

eCFR Part 2540 General Administrative Provisions

The following language on nonduplication/non-displacement must be part of the member service agreement:

Nonduplication

Corporation/AmeriCorps assistance may not be used to duplicate an activity that is already available in the locality of a program. And, unless the requirements of paragraph (f) of this section are met, Corporation assistance will not be provided to a private nonprofit entity to conduct activities that are the same or substantially equivalent to activities provided by a State or local government agency in which such entity resides.

Non_displacement

- An employer may not displace an employee or position, including partial displacement such as reduction in hours, wages, or employment benefits, as a result of the use by such employer of a participant in a program receiving Corporation/AmeriCorps assistance.
- An organization may not displace a volunteer by using a participant in a program receiving Corporation/AmeriCorps assistance.
- A service opportunity will not be created under this section that will infringe in any manner on the promotional opportunity of an employed individual.
- A participant in a program receiving Corporation/AmeriCorps assistance may not perform any services or duties or engage in activities that would otherwise be performed by an employee as part of the assigned duties of such employee.

- A participant in any program receiving assistance under this section may not perform any services or duties, or engage in activities, that –
 - Will supplant the hiring of employed workers; or
 - Are services, duties, or activities with respect to which an individual has recall rights pursuant to a collective bargaining agreement or applicable personnel procedures.

- A participant in any program receiving assistance under this section may not perform services or duties that have been performed by or were assigned to any
 - Presently employed worker;
 - Employee who recently resigned or was discharged;
 - Employee who is subject to a reduction in force or who has recall rights pursuant to a collective bargaining agreement or applicable personnel procedures;
 - Employee who is on leave (terminal, temporary, vacation, emergency, or sick); or
 - Employee who is on strike or who is being locked out.

Member Teleservice

Policy 2017.01 AmeriCorps State and National Guidance-Teleservice

AmeriCorps has issued a new policy on member teleservice as of January 2023. It indicates that teleservice is only appropriate when the activity can be meaningfully supervised and the hours verified independently. The program must have a policy that requires written authorization of teleservice in advance. Furthermore, members may not serve remotely (defined as outside of the commuting area of the service site) and may not serve at virtual service sites (defined as organizations that have no physical location).

Member Benefits

All members are required to be informed of their eligibility for AmeriCorps benefits such as living allowance, health care, student loan forbearance, and childcare. We encourage programs to also notify members of the Public Service Loan Forgiveness program. Programs should document that members are informed about these program benefits.

For AmeriCorps benefit purposes, AmeriCorps has previously indicated that programs may define what it means to serve in a full-time capacity (in a policy that typically would align with employee requirements) but has also shared with IDHS-Serve Illinois that programs may use a benchmark of 32.5 hours/week as an average service schedule that would be considered fulltime service; programs should note that the eligibility for certain benefits such as childcare

assistance may be lower, based on the requirements for the Illinois Department of Human Services Child Care Assistance program. Further questions should be directed to the program officer.

Member Travel and Training Reimbursements

Programs should follow their organizational policies for providing members with reimbursement for service-related travel or training expenses. Programs may not provide members with reimbursement for regular commuting expenses associated with travel between the member's residence and their assigned service site. See section 4 for more detail about allowable reimbursements.

Member Incentives

Programs may consider member incentives to recruit and retain members. Generally, incentives should be applied consistently; however, a benefit, such as housing, could be provided at the site level (see below).

Programs cannot provide gift cards or cash incentives of any kind to members. Additionally, host sites cannot provide gift cards, cash incentives, or additional living allowance for members serving at their sites. Please contact the designated program officer with questions about other member incentives.

As noted previously, IDHS-Serve Illinois is not a qualified tax preparer, but some member incentives may come with additional tax burdens that members should be made aware of in advance. Programs and members are encouraged to speak with a financial advisor to understand the impact of benefits on taxes.

Below are some examples of other member incentives:

- As a part the program design, programs can plan to pay returning members a higher living allowance to retain them for another term. In these cases, the member must have additional responsibilities, such as training or leadership roles. This practice should be documented in program policies and outlined in the member service agreement.
- Programs can design retention/completion incentives to be paid to the members after they have completed their term or to incentivize members to return for a second term. Bonuses of any kind should be worked into the program budget and the program should develop a written policy about how the bonus will be used, who will receive the bonus(es), when and how the member will receive the bonus, what criteria will be used to measure eligibility and how much the bonus(es) will be.
- Programs may provide housing-related benefits. Housing or a housing stipend can be provided, with limitations. Programs should notify their program officer if they will be providing member housing to ensure that they are doing so in a way that meets requirements.

- Programs may also offer additional professional development, beyond regular training, to members. Professional certifications or other professional development can be a great way to recruit or retain members.
- Also consider other local options that could benefit members such as mass transit passes for the purposes of travel between service sites, free or reduced cost access to gyms or local bike rentals.

Programs are required to have policies covering the use of bonuses, housing, or transportation support. IDHS-Serve Illinois must review and approve the policy prior to any use of these incentives. If programs are using any incentive, including defined/specific professional development, programs are expected to collect data from members on the effectiveness of those incentives on recruitment and/or retention.

Living Allowance

Programs must provide members with a living allowance that falls within the minimum and maximum amounts established each program year and announced in the federal Notice of Funding Opportunity (NOFO). Programs may pay members no more than the maximum amounts published in the NOFO.

Member.Living.Allowance.Amount

In general, IDHS-Serve Illinois expects programs to establish living allowance amounts at the beginning of the grant year. The amount of living allowance should not increase based upon the program's anticipated unexpended funds. A program may pay differing amounts of living allowance, but those differences should be based upon specific criteria and the program should have justification. For example, for members with leadership/team lead responsibilities or for positions that are unique and require additional skills, knowledge, and abilities, programs may pay a higher living allowance, but this amount should be included in the approved budget.

The member position descriptions should clearly demonstrate the increased or enhanced service activities. Programs wishing to use leadership or team leader member slots should be sure to review the requirements in the Terms and Conditions. Programs may pay member recruitment or retention bonuses according to a schedule outside of the regular living allowance distribution. Programs must have an approved policy in place before awarding or paying any bonuses. IDH. The amount of living allowance for members who start later in the grant year or for the summer program should not be increased simply to use up the program's anticipated unexpended funds. Programs should plan living allowances accordingly.

Living.Allowance.Distribution

Member living allowances are distributed to members evenly throughout their term based on the program design. Unless expressly approved by IDHS-Serve Illinois, a member's living allowance should not increase or decrease during their term of service. All member living allowance payments must be recorded in the sponsoring organization's financial records.

Therefore, it is not allowable for members to receive an additional stipend or living allowance payment directly from a site.

Payment Amounts for the Same Positions

Member living allowances are to be consistent and based on the cost of living, not individual circumstances such as one program site having more money to pay members than another. Programs should pay a larger living allowance amount only based on increased living expenses such as food or housing and keep documentation of the reasons for variance in living allowance rates within member files. It is also allowable to provide an increased living allowance to returning members (from local funds), however, these living allowance increases may only occur at the beginning of a service agreement period and all returning members across that position description must receive the same living allowance. If members serving the same terms of service receive varying living allowance amounts, the program must document the rationale behind this variance and this documentation should be retained in the member file. Additionally, members doing the same service activities within the same slot type should receive the same living allowance. It is not allowable to pay members different living allowance amounts for the same service position.

Community Service Funds (CSF)

Our bureau has allocated Community Service Funds for 2024 to help subgrantees with recruitment and retention. The plan is broken down by slot type, dollars allocated per slot type and a 15% administrative fee. The stipends will be administered when members reach different milestones based on percentage of service hours during their term of service. If you have any additional questions, contact your Program Officer.

No Hours Served in Pay Period

Members and programs should avoid situations in which members serve no hours during a pay period. If the member is not performing service for that period, the program should evaluate whether the member should be suspended for compelling personal circumstances or disciplinary reasons. All rules regarding member suspensions apply. If a program has a situation where a member needs to be absent for a significant period of time, they should contact their program officer as soon as possible to discuss the situation and establish a course of action.

Unless a member's term of service is suspended, they should receive their living allowance payment regardless of the number of hours served in that pay period. Programs cannot withhold member living allowance for a pay period with zero hours if the member was not suspended.

Taxes

The living allowance is taxable as income both in Illinois and at the federal level. Unless the recipient obtains a ruling from the Social Security Administration or the Internal Revenue Service that specifically exempts its AmeriCorps members from FICA requirements, the

recipient must pay FICA for any member receiving a living allowance. The recipient also must withhold 7.65% from the member's living allowance. The recipient must withhold Federal personal income taxes from member living allowances, requiring each member to complete a W-4 form at the beginning of the term of service and providing a W-2 form at the close of the tax year. The recipient must comply with any applicable state or local tax requirements.

Worker's Compensation

Illinois requires that all AmeriCorps members be covered by the organization's worker's compensation plan for service-related injuries. With prior approval from the IDHS-Serve Illinois programs may provide Occupational Accidental Death and Dismemberment coverage in lieu of worker's compensation coverage for education award only members. A copy of a memorandum from the State of Illinois Attorney General's office, clarifying that Illinois AmeriCorps members qualify as employees for the purposes of workers' compensation is available in Basecamp.

Programs should submit notice to their IDHS-Serve Illinois program officer any time a member files a worker's compensation claim. The program should notify their program officer in writing of any serious injury (whether or not it requires a worker's compensation report) or death occurring to an AmeriCorps member during the term of service. An email notification is preferred and should be provided to the program officer within 48 hours of the injury/death.

Liability Insurance

The program is responsible for ensuring adequate general liability coverage for the organization, employees, and members, including coverage of members engaged in on- and off-site project activities.

Unemployment Insurance

According to Illinois Administrative Rules, [Administrative Code Title 56 Section 2732.125](#) , AmeriCorps members are not considered employees for the purposes of unemployment insurance coverage. Therefore, members should not be listed on the agency/organization quarterly employee listing for the purposes of unemployment insurance coverage. If members are included on the unemployment report, programs run the risk of losing an unemployment ruling and being forced to pay unemployment to a former member. Federal funds cannot be used for any member unemployment claims.

Health Care

AmeriCorps Health Care

Except for Education Award Only and Professional Corps programs, Illinois AmeriCorps programs must provide, or make available, health insurance to full-time members who are not otherwise covered by a healthcare policy at the start of their service, as well as those who lose coverage during the term, due to their service or through no deliberate act of their own.

Programs have various options for meeting the healthcare requirement, but all Illinois AmeriCorps programs must offer a healthcare plan that meets Minimum Essential Coverage standards of the Affordable Care Act. Programs may choose any health care vendor they like to provide this coverage, provided it meets AmeriCorps requirements. IDHS-Serve Illinois does not endorse any health insurance company or provider. Programs that learn of vendors offering AmeriCorps-specific health plans are encouraged to share this information with IDHS-Serve Illinois and we will share this information with all programs.

Allowable Health Care Providers

Programs may use any health care coverage vendors, but they must ensure that the coverage meets the AmeriCorps requirements. For assistance in determining whether a plan meets AmeriCorps requirements, contact the IDHS-Serve Illinois program officer.

Documentation of Health Care Coverage

Summary of Benefits and Coverage for Tax Purposes: The health care provider chosen by the program will be responsible for providing a Summary of Benefits and Coverage to members covered by the plan to use for documentation when filing their taxes. Questions about this form should be directed to the health care vendor. Return the signed healthcare enrollment form to your Program Officer.

Members Serving a Full Time Capacity (but are not serving in a full time slot)

Members serving in less than full time slot types but are serving in a full-time capacity for an extended period of time (such as members who serve full time during the summer) are eligible for health care benefits paid by AmeriCorps funds. It is at the program's discretion to provide this benefit. For the purposes of this provision, a member is serving in a full-time capacity when his/her regular term of service will involve performing service on a normal full-time schedule. It may not be practical to offer members serving in shorter slot types, health care benefits. A member may be serving in a full-time capacity without regard to whether his/her agreed term of service will result in a full-time Segal AmeriCorps Education Award.

Temporary Leave and Health Care Benefits

If temporary leave is appropriate, grantees have the flexibility to determine the duration of the absence and may choose to continue providing health or other benefits to the member during the period of absence. The member may be suspended (via compelling personal circumstances) during the period of temporary leave. If suspended, the member may not receive a living allowance. The length of the leave should be based on two considerations:

(1) the circumstances of the situation; and

(2) the impact of the absence on the member's service experience and on the overall program.

If the disruption would seriously compromise the member's service experience or the quality of the program, then the grantee may offer the member the option of rejoining the program in the next class or completely withdrawing from the program. The Federal Family Medical Leave

Act, (FMLA) applies to full-time staff and members that have served for more than 12 months and at least 1,250 hours when the grantee has 50 or more employees/members at a work/service site per 29 USC§2611. See 42 USC§12631; 45 CFR § 2540.220.

Special Enrollment Period for the Health Care Marketplace

Members in the AmeriCorps State and National programs and their dependents in the Federally facilitated Marketplace are eligible to enroll in Marketplace coverage when they experience the following triggering events: on the date they begin their service terms; and on the date they lose any coverage offered through their program after their service term ends. (Source: 45 CFR § 155.420(d)(9)).

Members have 60 days from the triggering event to select a plan. Coverage effective date is prospective based on the date of plan selection. Individuals should contact the Marketplace call center at 1-800-318-2596 to activate the special enrollment period. They should inform the Marketplace call center that they are beginning or concluding service with AmeriCorps State and National, VISTA, or NCCC. Once determined eligible for the special enrollment period, the individual can then view all plans available to them and continue the enrollment process over the phone or online by creating an account on healthcare.gov or logging into their existing account.

Childcare

Childcare Overview Eligibility

[Childcare Benefit Program Link](#)

The Program must ensure that childcare assistance is made available to those qualified, active full-time members who need such assistance in order to participate (except members serving in EAPs, Professional Corps, or Partnership Challenge programs are not eligible for the childcare benefit). Members are not eligible to receive childcare benefits from AmeriCorps while they are receiving childcare subsidies from another source for the same period of AmeriCorps service.

AmeriCorps childcare benefits are paid directly by AmeriCorps to the provider; therefore, programs do not need to budget for this from their grant funds. Programs whose members are income eligible and have qualified dependents may access childcare by working directly with the AmeriCorps' national childcare provider, GAP Solutions, Inc. Visit the AmeriCorps childcare webpage for more information on how to access this assistance.

The Illinois Department of Human Services (state agency responsible for state childcare benefits) requires that members access benefits available through GAP Solutions, Inc. before obtaining state benefits (referred to as "Childcare Assistance" and administered at the County level). Payments or reimbursement for childcare benefits can be made only to qualified providers, from the date childcare need was established after service began. The amount of childcare allowance may not exceed the applicable payment rate established by the Illinois

Department of Human Service Child Care Assistance program. No payments or reimbursements will be made in the event the AmeriCorps member was ineligible, or if the provider was not qualified under the state guidelines.

Programs may provide childcare benefits to less-than-full-time members, but they are not required to do so. For less-than full-time members who are not serving in a full-time capacity, the program may provide this benefit out of their own non-AmeriCorps funding sources by working directly with GAP Solutions, Inc. Less than full-time members who are serving in a full-time capacity (such as fulltime summer members) may be eligible for childcare assistance provided out of AmeriCorps funds.

Programs must notify the childcare assistance provider if a member is eligible for benefits at the start of his/her term, and must immediately notify the childcare assistance provider and other relevant AmeriCorps contacts when:

- A member's status changes such that he/she is no longer eligible for the assistance (i.e., conversion of member term/schedule to less-than full-time, release for cause, suspensions, increase in family income, etc.).
- New or existing members become eligible for childcare benefits;
- A member wishes to change childcare providers, or a childcare provider will no longer provide childcare services; or
- A member is absent for excessive periods of time (defined by AmeriCorps as five or more days in a month, including for sick or maternity leave).

Costs incurred due to the program's failure to keep the AmeriCorps childcare provider immediately informed of changes in a member's status may be charged to the program. IDHS-Serve Illinois also strongly recommends that programs inform their program officer of any of their members who will be applying for childcare assistance, so that IDHS-Serve Illinois can help provide guidance and answer questions about eligibility, payments, etc. In addition, if a member experiences challenges with enrolling with GAP or with taking leave, please contact your program officer.

Note: The Childcare

Student Loan Forbearance, Deferment, Interest Accrual Payments

National service members have options for how to deal with their qualifying student loan payments during service. Members requesting forbearance should do so through the eGrants/My AmeriCorps Portal. Programs should be cautious about promising these benefits to members because lending institutions have latitude in whether they will grant these statuses, depending on the type of loan, whether it has been consolidated and other factors. Most often privately held student loans will not qualify for any of these benefits, however a

member can ask their private loan holder for a deferment. If there are questions, the member should work directly with his/her lending institution to determine whether he/she qualifies.

Loan Forbearance

Under the National and Community Service Trust Act of 1993, borrowers serving in approved national service positions qualify for mandatory forbearance of qualified loans during their terms of service. This mandatory forbearance allows borrowers to delay payments temporarily. During the time members are serving in a national service position, interest will continue to accrue on their loan(s). Upon successful completion of their national service term, AmeriCorps will pay all or a portion of the interest that accrued on the qualified loans during the time period served. If members leave for reasons other than compelling personal circumstances, they will be responsible for payment of interest and, if not paid, it may be capitalized depending on the type of loan.

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 Student Loans (Direct Subsidized and Unsubsidized Stafford/Ford Loans, and Direct Consolidation Loans), Federally Insured Student Loans (FISL), Health Education Assistance Loans (HEAL), Health Professions Student Loans (HPSL), Loans for Disadvantaged Students (LDS), Nursing Student Loans (NSL), and Primary Care Loans (PCL).

Economic Hardship Loan Deferment

Less commonly, national service members may be eligible for deferment on student loans for reasons of economic hardship during the member's term of service. For subsidized Stafford loans, interest does not accrue during deferment. For unsubsidized loans (including unsubsidized Stafford, Graduate PLUS, and Parent PLUS), the interest accrues and is capitalized at certain times, and the loan holder is responsible for paying it. Many members meet their lenders' requirements for deferments based on economic hardship, regardless of whether their loans are federally approved or not. However, interest may still accrue on loans in deferment, especially those that are unsubsidized. Additionally, some lenders may set limits on the number/length of time that loans may be placed in deferment. For private student loans, deferment eligibility is based on loan type. Members should contact their lending institution to determine whether they may qualify for this type of deferment.

Public Service Loan Forgiveness Program (PSLF)

Public Service Loan Forgiveness (PSLF) is a federal program designed to encourage students to enter potentially low-paying careers like firefighting, teaching, government, nursing, public interest law, the military and religious work.

If individuals qualify for PSLF and enroll in the program, they can get their remaining student debt forgiven tax-free after making 10 years' worth of monthly payments, for a total of 120 payments, while working for the government or a nonprofit. They also be on an [income-driven repayment \(IDR\) plan](#) that caps monthly bills at a set percentage of your income. You can find out more about the PSLF program

in the “Public Service Loan Forgiveness Program: How to Maximize your AmeriCorps Term of Service and Education Award” document on Basecamp.

Eli Segal Education Award (Education or Ed Award)

Award Basics and Amounts

Members who successfully complete their terms of service are eligible for an education award; members who exit early for compelling personal circumstances may be eligible for a pro-rated education award. The amount of the Segal AmeriCorps Education Award is tied to the maximum amount of the U.S. Department of Education’s Pell Grant in the year in which the national service position was awarded. Full-time members can earn the maximum award amount and the education award value for less than full-time members is pro-rated according to their term of service. Since the maximum amount of Pell grants can change from year to year, so can the value of education awards, however the amount of the education award does not change during the grant year. Programs should check IDHS-Serve Illinois’ grantee resource page for the current program year’s education award amounts. See Studentaid.gov for more resources and information.

Limits on Earning Education Awards

Members may not receive more than an amount equal to the aggregate value of two full-time education awards. The value of an education award received is calculated based on its proportion to the full education award in the year the award was approved. An individual who, based upon the aggregate value of education awards previously received, is not eligible to receive the entire award amount offered for a term of service, will instead receive the portion of the education award that he or she is eligible to receive.

Individuals who have received a transferred education award must count the value of that education award when determining the education award amount, they are eligible to earn through their own service (i.e., a member whose grandmother transferred to him a 0.5 value education award can only earn up to 1.5 education awards through his own service). See [Transferability](#) for more.

Members may serve additional terms of service even if they have reached the limit of two full-time education awards. Members may serve up to four terms in AmeriCorps State and National (ASN), five terms in AmeriCorps VISTA (including VISTA Summer Associates), or two terms in AmeriCorps NCCC. Members who serve a successful term in an ASN program after already having earned two full education awards should be exited under the “successful completion- with full education award” status (the eGrants system will recognize that the member is eligible for \$0 in education award value).

Using the Education Award

The education award can be used to cover current educational expenses at eligible institutions or to repay qualified student loans.

Eligible schools are Title IV schools or GI Education Bill Programs. Higher educational institutions, both domestic and foreign, that currently participate in the Department of Education's Title IV student aid programs are referred to as "Title IV schools." This category includes most post-secondary colleges, universities, and technical schools. If the school offers students federal student aid such as Stafford Loans, William D. Ford Federal Direct Loans, Federal Perkins Loans, Stafford Loans, and Public Health Service Loans, it means the institution participates in the Title IV program and is a "Title IV school".

GI Education Bill Programs: The award can also be used for educational expenses associated with enrollment in programs of education, apprenticeships, or job trainings approved for educational benefits under the Montgomery G.I. Bill and the Post 9/11 G.I. Bill. Regarding the education award, such programs are referred to as "GI Bill approved programs".

If the GI-Bill approved program is offered by a Title IV school, the award can pay for current education expenses by virtue of it falling under the category of being a Title IV school. If the GI-Bill approved program is NOT offered by a Title IV school, it is referred to as a "GI-Only Program" and special rules apply. The Serve America Act allows veterans to use the AmeriCorps award for education, apprenticeship, and on-the-job training at institutions that accept the G.I. Bill. This greatly expands the opportunities for use of the award beyond the Title IV list. The rules for using the education award at GI-Only Programs are based upon the date the award was certified (approved) by an authorized AmeriCorps program staff, and whether the AmeriCorps alum is a veteran.

- A Segal AmeriCorps Education Award certified on or after December 23, 2011, can be used if the member is a veteran.
- An award certified between October 1, 2009, and December 22, 2011, can be used by both veterans and non-veterans.
- No award certified prior to October 1, 2009, can be used for GI-Only programs, even if the alum is a veteran.

Education expenses are considered "current" if they were incurred on or after the date the member began his or her term of AmeriCorps service. Eligible educational expenses are based on:

- The Cost of Attendance (COA) for a degree or certificate-granting program at a Title IV school.
- Educational expenses for non-degree courses, such as continuing education courses offered by Title IV schools.
- Educational expenses for enrollment in G.I. Bill approved courses or programs.

The Segal AmeriCorps Education Award can only be used to repay the qualified student loans listed below:

- Loans backed by the federal government under Title IV of the Higher Education Act (except PLUS Loans to parents of students)
- Loans under Titles VII or VIII of the Public Service Health Act
- Loans made by a state agency, including state institutions of higher education

Members can make payments from their award in full or in part and can take up to seven years after their term of service has ended to use their award. Individuals who receive a transferred award have ten years from the date on which the transferring individual earned the award to use it. Members will manage their education awards through the eGrants/MyAmeriCorps Portal. Some institutions will match the education award if it is redeemed at their school; but claiming the education award up front may also affect a member's eligibility for other financial assistance. Members should research the best option for their individual circumstances. More information about the range of options for utilizing the award and tips for maximizing the education award value can be found by contacting IDHS-Serve Illinois. AmeriCorps provides Guidelines and Uses for the Education Award for more details.

See more at [Segal AmeriCorps Education Award | AmeriCorps](#).

Taxes and the Education Award

Note that IDHS-Serve Illinois is not a qualified tax preparer, and the following guidance is not official tax advice: AmeriCorps Segal Education Award payments (interest and award disbursements) are taxable as federal and State of Illinois income in the year they are redeemed. Members should anticipate this when choosing when and how much of their education award to redeem.

Transferability of the Education Award

Under certain limited circumstances, AmeriCorps State and National (ASN) members may be able to transfer the education award they earn to their child, grandchild, or foster child. A member may transfer an education award if the member was age 55 or older on the day he/she enrolled in the ASN position; the award the individual is requesting to transfer has not expired; and the individual designated to receive the transferred award (a) is the transferring individual's child, grandchild, or foster child; (b) is a citizen, national, or lawful permanent resident alien of the United States; and (c) has not already utilized the equivalent value of two full-time education awards. The person considering the transfer to another party should verify any additional requirements or stipulations by contacting the National Service Trust prior to attempting to make a transfer.

A transferred education award may be used for the same purposes as an earned education award. Members can initiate a transfer request through the eGrants/MyAmeriCorps Portal. Individuals receiving a transferred award have ten years from the receipt of award to redeem it. Transferred awards count toward the limit of AmeriCorps service terms for those who go on

to enroll in an AmeriCorps term on their own; individuals are only able to receive two awards total, whether transferred or earned directly.

Member Timekeeping, Discipline and Term Management

Member Timekeeping System and General Timekeeping Requirements

Timekeeping systems should be set up each year at least one week prior to enrolling any members. Programs will be responsible for instructing members on the correct method of tracking time, regardless of the time sheet system they use. If the person approving the timesheets is not co-located with the member or is not typically on site when the member is serving, a process should be developed to ensure member time is documented and reviewed prior to timesheet approval.

The bulk of member hours will be recorded as direct service. For programs in which capacity building is a major member service activity, these capacity building service hours are also tracked under the “direct service” category. Members should enter hours that are spent in service, training, or fundraising activities. If programs are using the enhanced time sheets, there may be additional service categories from which to select. Members are not allowed sick and personal leave; therefore, time spent off-duty, cannot be listed on member timesheets, unless the timesheet design specifically tracks lunch as time off. Members should not serve any hours on New Year’s Day, Memorial Day, 4th of July, Labor Day, Thanksgiving and Christmas Day. This includes checking emails, self-directed training, or teleservice. Specific service may be allowed if the program has a planned event and they have received prior approval from IDHS-Serve Illinois. Service on other federal holidays is at the discretion of the program. IDHS-Serve Illinois suggests member service hour limits of 12 hours/day, 120 hours/per 2 weeks, 200 hours/month. Individual programs may adjust these limits, within reason, based upon their service activities and program design. Programs cannot withhold living allowance for zero-hour time sheets unless the member is in suspended status. Programs may withhold payment for missing timesheets, in alignment with the language in the member service agreement. The withheld payment should be made once the timesheet has been approved.

Tracking Member Fundraising Hour Limits

AmeriCorps members may raise resources directly in support of a program's service activities; however, they are excluded from raising funds for their living allowance or for an organization’s operating expenses or endowment, and from writing grant applications for AmeriCorps or any other federal grants. All programs are required to ensure that individual members limit their time spent fundraising to not more than 10 percent of their term. Further, programs are required to identify fundraising, training, and service hours separately on the member time records. Members who do not engage in fundraising activities should indicate “0” hours on their time records in the “fundraising” area.

Tracking Member Training Hour Limits

Members are required to receive certain trainings (see the Member Training Section). Since all members are required to receive training, members with zero (0) training hours listed will raise concerns in member monitoring. However, members should aim to spend no more than 20 percent of their service terms receiving training because programs are limited to having no more than 20% of aggregate member hours spent in training. If a program has a member position that may require more than 20% training time, please contact the IDHS-Serve Illinois program officer to discuss.

Fixed Amount Grants and Member Timekeeping

Fixed Amount Grants are responsible for monitoring their own member timekeeping in alignment with federal grant requirements and maintaining timekeeping records for audit purposes. Timekeeping records should support all claims made to IDHS-Serve Illinois.

Managing Time Sheets After Member's Departure

Members are required to have a submitted and approved time sheet for each pay period covered by their term of service. Programs should make an effort to encourage members to complete missing time sheet(s). If a member(s) leave service and will not or cannot enter time and submit missing time sheet(s), program staff will need to be responsible for them.

Programs can manage missing time sheet(s) by working with the site supervisor to get the time served by date and type of service (training, direct or fundraising).

Standards of Conduct and Member Disciplinary Policy

All AmeriCorps State programs must develop standards of conduct that are communicated to members within the member service agreement and Member Orientation. These standards inform members of the expectations that programs have of them (such as that members will complete duties as assigned, submit reports on time, follow service site dress code, etc.).

To address behavioral, attendance, or other disciplinary problems that may arise when members do not adhere to the program's standards of conduct, IDHS-Serve Illinois requires all programs to develop a written member disciplinary policy. Members should be advised of the procedure and potential disciplinary actions within their member service agreements. Disciplinary policies should outline the steps that may be taken and the authority (site supervisor, program staff) responsible to document and/or order such steps. Possible disciplinary actions may include verbal and written warnings, fines, temporary suspensions, or termination. Programs that wish to institute a policy for fining members should first check with their program officer to make sure their policy is in compliance with all other AmeriCorps regulations (i.e., fines cannot be calculated on an hourly basis, must be from that portion of the living allowance paid by non-Federal funds).

Any disciplinary actions taken must be fully documented in the member file. Programs should document in the member file whenever disciplinary problems arise and the corresponding action (verbal warning, written warning, etc.) that is implemented.

Member Performance Evaluations

All full-time, three quarter-time, and half-time members must have both a written midterm and end of term evaluation. IDHS-Serve Illinois requires that any less-than HT members (RHT, QT, MT, AT) that serve over a period time of nine (9) months or more in cost-reimbursement or Fixed Amount programs must also have both a midterm and end of term evaluation. All members must have a written end of term evaluation, regardless of program type, length, term of service, or type of exit. See below for evaluation requirements.

Performance Evaluations, Minimum Requirements

The midterm and end of term evaluations are used in conjunction with the member exit form to indicate whether members exit successfully, for compelling personal circumstances, or for cause. Evaluations must include these items:

- Signature and date of the member and a program representative
- Assessment of whether the member has completed the required number of hours (or is on track to complete the required number of hours),
- Assessment of whether the member has satisfactorily completed assignments, tasks, or projects, (or for midterm evaluations or for those participants released from service early, whether the participant made a satisfactory effort to complete those assignments, tasks, or projects that the participant could reasonably have addressed in the time the participant has served); and
- Assessment of whether the member has met other performance criteria that were clearly communicated at the beginning of the term of service.

According to the Terms and Conditions, failure of the program to complete an end of term evaluation can result in the member being unable to serve a subsequent term of service and may require the program to repay costs associated with a subsequent term served if there is no end-term evaluation for the prior term. Programs are encouraged to add their own evaluation questions and criteria, as long as the minimum requirements are in place.

When a midterm evaluation identifies concerns that could prevent a member from exiting successfully (on time with an education award) the program should develop a corrective action plan in conjunction with the member and supervisor, to address the identified issues. Certification within eGrants of a member's eligibility for an education award/subsequent term of service should be based on the results of the member evaluation, especially in regard to whether or not the member performed satisfactorily.

Evaluations for Members Who Exit Early

Members who are terminated early must have a member end of term evaluation completed by the program at the time of their termination and maintained in their file; but may not be required to have a midterm evaluation (if they exited before a midterm evaluation would reasonably have been completed).

Documentation of Member End of Term Evaluations

These records must be maintained, in hard copy or electronically, as applicable. The documentation must show that the member received the evaluations by including the member signature, or for members who exit early and do not participate in the final evaluation, by documenting program efforts to contact the member to obtain such signature. Completing the exit form in the eGrants/My AmeriCorps Portal (“Portal”) is not sufficient to meet the member evaluation requirement. In addition, programs are reminded that a “Member/Slot Change Form” must be submitted to IDHS-Serve Illinois for approval prior to exiting the member in the Portal and that member terminations should be approved in the Portal within 30 days of the event.

Reviewing Evaluation from Previous Service Terms

It is important to ensure that a member who served previously is eligible to serve again, and programs should make a reasonable effort to confirm eligibility. If the member received an education award, it is reasonable to assume the member served satisfactorily in the previous term. If the member was released for cause without receiving an education award, Illinois programs should check with the previous service organization to verify eligibility. Failure to verify member eligibility in relation to previous service may result in some or all the costs associated with that member can be disallowed. The My AmeriCorps Portal includes evidence of members’ past service.

Term Management

Consecutive Member Terms in the Same Program Year

A less-than-full-time member may serve consecutive terms in the same or another AmeriCorps State program during the same program year (the total MSY served during the program year may be required to be less than or equal to 1.0 MSY). If the second term will involve the same or similar activities as the first term, then the member should fill all expectations to complete Term A before being enrolled in Term B. For example, if a member completes the minimum hours but has not reached the exit date of Term A, she may not exit that term early to start accruing hours for Term B. The member must independently meet the requirements for both Term A and Term B. Programs considering enrolling a member in consecutive terms within the same program year should notify their program officer to confirm the allowability and ensure that member timekeeping is set up correctly.

Concurrent Member Terms

Under certain circumstances, a less-than-full-time member may be allowed to serve concurrently in two separate Illinois AmeriCorps programs during the same program year. Programs considering enrolling a member under this circumstance should contact their program officer to discuss the allowability of the proposed concurrent service, proper timekeeping set up, and other documentation that may be required to demonstrate compliance with AmeriCorps requirements.

In general, concurrent service within the same program year is only allowed when:

- The total value of the MSY (or MSY+FTE) being served (or served and worked) is less than or equal to 1.0;
- The duties and schedule for the concurrent terms can be clearly distinguished;
- The member independently meets requirements for each position;
- If the member started one position before the second position is added, the member has been performing satisfactorily in the first position;
- The positions are in two different programs;
- Other requirements established by AmeriCorps/ IDHS-Serve Illinois are met.

Service and Work with the Same Organization in the Same Program Year

Program staff should talk with their program officer if they have a member considering this arrangement. Members may be allowed to serve and work at the same organization/sponsor in the same program year as long as they meet the following criteria:

- The duties of the service and work must be clearly distinguished. The program must provide the position description for the job to IDHS-Serve Illinois for review prior to allowing both service and work for the same organization.
- The service and work hours should be defined so that there is no confusion about what the member is counting as service hours.
- The service and work commitments should not exceed 40 hours per week.
- If the wages for the job are paid with federal funds (i.e., federal work study) other actions or restrictions may be necessary.

Changing Member Term Types After Enrollment

Slot conversions for enrolled (filled) member slots are expected to be rare and programs may not change an enrolled member's term of service without prior authorization from IDHS-Serve Illinois.

When considering changing a member term from a larger term type to a lesser term type, IDHS-Serve Illinois will consider several factors, such as the impact on program quality (including the ability to meet expected performance measure targets), the timing of the request in the member's term, whether there has been a significant change in availability of service activities during member's anticipated service schedule, and confirmation the member understands the impact of the term change (i.e., reduced living allowance, reduced education award, potential ineligibility of other benefits). It is not allowed to convert down a filled slot simply to provide an education award to a member who has not met their hour

requirements and IDHS-Serve Illinois will not approve requests made on member's behalf because the member fell behind in hours during their term.

AmeriCorps discourages converting filled slots up to a larger term of service. Conversions of filled slots are typically approved by IDHS-Serve Illinois only when they occur very early in the term of service and usually due to a compelling personal circumstance.

If approved, the program officer also needs to approve the change in eGrants. Programs must immediately notify the AmeriCorps-designated childcare and healthcare providers, in writing, when a member's status changes in a manner that affects their eligibility for childcare or healthcare.

Please utilize the [slot conversion chart](#) for slot conversions. Slot change requests should be sent to your program officer at DHS.ILAmeriCorpsPO@illinois.gov.

Member Transfers Within a Program Year

IDHS-Serve Illinois may approve member transfers among AmeriCorps State and National programs for compelling personal reasons. Specific requirements must be met by the member, the transferring program, and the receiving program. Any Illinois AmeriCorps State program should contact IDHS-Serve Illinois as soon as possible if they have a situation in which they may wish to transfer a member or receive a transferred member. The transfer of a currently serving member may have different criteria and allowability than the transfer of unfilled slots.

Member Discipline

Member Suspension and Temporary Leave

Definitions and policies: Suspension of service is defined as an extended period during which the member is not serving, nor accumulating service hours or receiving AmeriCorps benefits. Members should not be suspended for regular short-term absences. Members may also be offered temporary leave (with or without a suspension) for extended absences for compelling personal circumstances. Programs must have a suspension policy in place and terms related to suspensions should be outlined in member service agreements.

The following are circumstances that may require suspension or temporary leave (with or without a suspension).

Suspension for Criminal Charges and Convictions

Programs must suspend members facing official charges for violent felonies, for selling or distributing controlled substances, and members convicted of possession of controlled substances. Members suspended for these reasons may not receive a living allowance or other benefits during their suspension. Reinstatement of members suspended for these reasons is only allowed under specific circumstances outlined in the AmeriCorps regulations. Please contact the program officer if this situation occurs. Please refer to [eCFR: 45 CFR Part 2522](#).

Suspension for Disciplinary Reasons

Members may be suspended for programmatic disciplinary reasons, for failing to uphold the service requirements and standards of conduct agreed upon in the member service agreement. In these cases, the program should specify the terms of the suspension, including the length of suspension and action steps that the member must take to be reinstated.

Please refer to [eCFR: 45 CFR Part 2522](#).

Suspensions Related to Grievances

If a grievance is filed regarding a proposed enrollment of a member in a program, such enrollment must not be made unless it is consistent with the resolution of the grievance, and the enrollment is considered suspended while the grievance is pending. Also, if a member grieves a program's decision to exit them for cause, then their service must be suspended pending the resolution of the grievance. For this type of grievance, the member suspension and exit will be treated the same as any other suspension (i.e., no service hours during suspension, no living allowance payments during suspension, etc.) unless the program has other written approval from the AmeriCorps agency. Please refer to [eCFR: 45 CFR Part 2522](#).

Suspensions or Temporary Leave for Compelling Personal Circumstances

If temporary leave is appropriate (such as an accident or serious illness, death of a family member, or childbirth), programs have the flexibility to determine the duration of the absence and may choose to continue providing health or other benefits to the member during the period of absence (however, the program should confirm that childcare benefits can be continued, if applicable). The member may be suspended (via compelling personal circumstances) during the period of temporary leave. If suspended, the member may not receive a living allowance. Alternatively, members may be offered temporary leave for compelling personal circumstances without being put into suspension status. This may be appropriate in situations such as maternity leave if a program wants to continue providing the member with a living allowance during the temporary leave period. The length of a suspension or leave in this case must be balanced by the individual circumstances and the impact of the absence on the overall program and the member experience. If the anticipated leave may seriously compromise the member's experience or the overall program quality, the program should consider offering the member the option of exiting for compelling personal reasons. The Family and Medical Leave Act may apply for members and organizations who meet other requirements. Please refer to [eCFR: 45 CFR Part 2522](#).

Temporary Leave or Service Extensions for Anticipated Absences

Programs should confirm candidates' availability to serve the entire term of service prior to enrollment. If someone indicates plans that will require a long-term absence, such as a pre-planned vacation, internship, or short-term study abroad, the program must contact the IDHS-Serve Illinois program officer as soon as possible, preferably prior to enrollment. Ideally for anticipated absences, programs will work with IDHS-Serve Illinois and the member to plan in advance to accommodate the absence via temporary leave without an adjustment to the

service term. When programs are requesting to extend a member service term, they should be prepared to discuss the following with the IDHS-Serve Illinois program officer:

- Is the member in good standing with the program? (program-defined)
- Is there a plan for the member to complete her/his hours and activities following the absence?
- Is the member on track with hours and required reporting prior the start of a scheduled absence?
- How long is the long-term absence and how much time is left in the member's term?

Please refer to [eCFR: 45 CFR Part 2522](#).

Documentation and Management of Suspension

Programs are required to report any intent to suspend a member to their program officer within five days of awareness of the intended suspension. You can reach the Program Officer at DHS.ILAmeriCorpsPO@illinois.gov. The reason for the suspension must be documented in the member file and communicated to IDHS-Serve Illinois using the [Member Suspension Approval Form](#). Only members suspended properly will be considered officially suspended and eligible for a term extension. Programs must indicate under what circumstances they desire to suspend a member. Regardless of the sensitivity of the issue, programs are required to maintain acceptable supporting documentation of this information in the member files (which should be secured and confidential).

IDHS-Serve Illinois does not typically allow programs to suspend members for a period of more than three months. If the time off required for the member to return to service exceeds three months, the program should consider potential alternatives, including an exit for Compelling Personal Circumstances. Approval for a suspension that exceeds three months may be given in limited situations. Programs must provide a timeline and reasonable schedule for service after the suspension has been completed. Suspensions lasting more than two weeks require weekly check-ins with the member. Programs must also provide updates to Serve for suspensions that continue beyond the originally approved time. Updates may also be required for longer-term suspensions. This will be determined by the program officer.

Programs are required to notify IDHS-Serve Illinois within five days when a member returns to service following a suspension (for any reason). The program officer will review and upon approval, members' suspensions and returns must be recorded in eGrants within 30-days of the effective dates.

Living Allowance? Benefits and Service Extensions for Suspensions.

Suspended members are not eligible to receive any living allowance while in suspension. Members suspended for compelling personal circumstances criteria may be eligible for continued benefits. Members given temporary leave (without a suspension) may continue receiving the living allowance. Under no circumstances may any members under suspension receive hours toward their term of service. Once service has resumed, member timesheets should be submitted with all 0-hours for the time period the member was suspended. During an audit the time sheet will show it had been in suspended status. If a member is not in an approved suspension status and submits a 0-hour timesheet, the program cannot withhold the living allowance payment from the member. Note that the time spent in suspended status does not count toward the 12-month limit during which members must complete their term of service. Members who are suspended and then return may be eligible for an extension to their term of service, up to the same length of time for which they were suspended, in order to have more time to complete the expectations of their position (minimum hours, assigned service activities, etc.). During the extension they are able to receive the living allowance that they were not afforded during their suspension. Members may not receive a lump sum payment in order to make up for living allowance not received while suspended.

Member Service Credit Time Off for Special Circumstances

Members should refer to the Terms and Conditions for certain special circumstances that dictate how member time should be treated in relation to jury duty and service in the Armed Forces Reserves/National Guard. The Terms and Conditions dictate service credits that members must receive (for jury duty) and should receive (for reserve service). The Terms and Conditions and Section 4 of this manual provide information about member pay/benefits during these special circumstances.

Member Exits and Refilling Slots

Member Exits -Education Award Status and Future Service

AmeriCorps members may be exited from the program because they: 1) have successfully completed their term, 2) must be released from their service early due to a compelling personal circumstance, or 3) were released from their service early for cause. The exit status of a member determines whether he or she earns an education award and affects his/her eligibility for future AmeriCorps service. Note that once a member is exited with a partial education award, the remaining portion of that education award is not available for use by the program through a refill slot. For any member that is suspended/reinstated or is released from service early for cause/compelling personal circumstance, the program is required to notify their IDHS-Serve Illinois program officer. The notification should include the member's name and brief description (i.e., Member First and Last Name – Exit for cause).

Members are required to complete all programmatic documents (including evaluations, timesheets, exit forms, etc.) to achieve a successful completion of a term of service, including exits for compelling personal circumstances. Members who do not complete the documents

in a timely manner can be denied a Segal Education Award. Programs cannot complete the Exit Form on behalf of a member. It is recommended that programs inform members of this at the beginning of their term to encourage timely submission of forms from members.

Did the member serve through the MSA date?	Did the member serve the minimum # of hours	Did the member perform satisfactorily	Exit Type	Education Award Eligibility	Future Service Eligibility (subject to term limits)
Yes	Yes	Yes	Successful completion	Entire Award	Eligible
No*	Yes	Yes	Successful completion – ahead of schedule	Entire Award	Eligible
No	No	Yes	Compelling Personal Circumstances	Pro-rated Award*	Eligible
Yes	No	Yes	Release for Cause	Not Eligible	Eligible but must disclose prior release for cause
No	No	Yes	Release for Cause	Not Eligible	Eligible but must disclose prior release for cause
No	No	**No	Release for Cause	Not Eligible	Not Eligible
No* (due to errors with enrollment in eGrants)	No – Unable to due to loss of hours because of enrollment date in eGrants	Yes	Compelling Personal Circumstances	Eligible for Partial Award	Eligible

* Eligible if the member served at least 15% of the minimum service hours and meets other program exit requirements.

** Only members who do not perform satisfactorily are INELIGIBLE for a subsequent AmeriCorps term. Exiting early for cause does not preclude them from serving again later if they are given a satisfactory performance rating and meet other thresholds.

Member End Date and Service Hours Completion

Under no circumstances should members continue serving beyond their member service agreement period or the program's grant agreement period. This is for the protection of both the member and the program. Members serving beyond the program's project period will not be covered by a member service agreement (and are technically not members) and therefore raise many liability and safety issues for members, the public, and the program. Hours served outside of a fully executed member service agreement and/or grant agreement will be disallowed in case of audit, which may result in repayment of federal funds.

When recording service hours completed as part of the exit process in eGrants, record the hours as they are entered and approved in the timekeeping component. All hours should be rounded down to the nearest whole number.

Therefore, programs should be aware that rounding issues may result in members falling short of the minimum requirements and not being eligible for an education award. For example, a full-time member with 1699.75 hours must be reported as 1699 in eGrants and would not be eligible for an education award. The program needs to ensure no hours are recorded or counted prior to the service start date or after the service end date.

The exit process should never be completed by the program until all member time sheets are submitted by the member, approved by the site supervisor, confirmed as accurate by the program, and entered into eGrants based on approved hours in the program's timekeeping system. Hours that are not approved in the timekeeping system cannot be entered into eGrants and are therefore not considered as earned hours toward an education award. If a member (regardless of successful or compelling personal circumstance exit) does not complete all required timesheets during their term of service, the member will not be eligible for an education award until all timesheets are completed satisfactorily. Programs also cannot claim member costs (i.e., living allowance) on the grant unless supported by a submitted and approved timesheet.

Member.Exit.-.Successful.Completion

Members agree to serve for a certain time period AND to complete a minimum number of hours during that time period. Members who fulfill these requirements, meet other expectations of the service term, and provide satisfactory service, are exited from the program with a full education award.

Members who complete the term of service satisfactorily but who have already earned the value of two full-time education awards should still be exited successfully in eGrants with the status of "Eligible for Full Award." In these circumstances, the members earned a \$0 education award.

Any individual who makes a materially false statement or representation in connection with the approval or disbursement of an education award or other payment from the National Service Trust may be liable for the recovery of funds and subject to civil and criminal sanctions (See the Terms and Conditions).

Member.Exit.-.Successful.Completion.Ahead.of.Schedule.

Programs may have members who complete assignments and reach the service agreement hours requirement in advance of the originally agreed upon service end date (i.e., in less time than proscribed in the approved enrollment plan submitted to the IDHS-Serve Illinois at the beginning of the grant year). Although not encouraged, programs may amend the member service agreement to allow such members to exit as successfully completed, but slightly in advance of the original service end date, if the member, site supervisor, program and IDHS-Serve Illinois all agree to the new end date. Amended end dates for members should be reasonably close to the original end date, and proportional to the original term and length of service (i.e., exiting a full-time member two weeks early from a 52-week term could be reasonable but exiting a minimum-time member two weeks early from an 8-week term is not). This is because the program should have designed the term of service such that if members served in their expected service schedule, they will be able to complete program tasks and meet minimum hour requirements over the course of the original term. If a program seems many/repeated instances where members are wishing to exit ahead of schedule this may be a reason to review member training to remind members of their full-service commitment and/or to reconsider the program design to see whether a shorter service term or less intense service schedule are appropriate.

IDHS-Serve Illinois staff must review any requests to exit members more than two weeks or one pay period ahead of the original end date (see more in the documentation section below). These members will earn a portion of the living allowance based on the portion of the service term that was successfully completed and how that aligns with the program's pay periods. For instance, if a program that has a 48-week program design and pays members every two weeks has a member that completes the term of service (with program approval) in 46 weeks, then the program will provide the member 46/48 of the living allowance (paid for 23/24 pay periods). The member is eligible for the full value of the education award (assuming he/she performed satisfactorily and met all other goals of his/her term of service).

Approval.and.Documentation.of.Successful.Member.Exit

Members must receive an end of term evaluation certifying that they meet the requirements for a successful exit with a full award. Programs must change the member status to Exited in OnCorps and need to exit the member in the eGrants/MyAmeriCorps Portal within the 30-day deadline. No prior approval from IDHS-Serve Illinois is required to exit members who successfully complete their term – meaning both the timeframe and hourly requirement. Members who complete their hours early may A

[Approval and Documentation of Successful Completion Ahead of Schedule](#)

Programs must notify IDHS-Serve Illinois of circumstances in which they plan to exit a member successfully, but in advance of the end date agreed upon in the Member Service Agreement. This is required for any member who is exiting successfully, but more than 2 weeks ahead of the scheduled exit date. All other standard exit steps should then be completed.

[Members Serving Less Than 75% of the Term and Immediate Exits](#)

Members who serve less than 15% of their term must be exited for cause and, except in cases of misconduct, such service does not count towards the term limit. So, members who enroll and never show up for service, or those who only attend orientation or serve for a day and determine that national service is not for them are exited for cause. Programs can complete a Program Officer Notification status report form for members who never show up for service and do not have an approved timesheet. If a timesheet account has been created for a member that has shown up, the Compliance Officer can remove it. A member who has served a day or two before determining that he/she/they does not want to continue should be paid for those hours. Be sure to follow the program's Member Exit and Payroll Policy. A time sheet must be completed and approved if the program is claiming the member living allowance as a grant expense. Programs also must have a signed and dated Member Service Agreement in place. Another option for handling this might include paying this expense with funds from another source (non-grant funds); then a timesheet and Member Service Agreement would not be needed.

Early Termination for Compelling Personal Circumstances (CPC)

[45 CFR 2522.230-Under what circumstances may an AmeriCorps participant be released from completing a term of service, and what are the consequences?](#)

Members may be released early from their term of service if the program determines that the member cannot complete his/her term due to compelling personal circumstances beyond the member's control. See the AmeriCorps regulations for specific examples of what does and what does not constitute a compelling personal circumstance.

Compelling Personal Circumstance for Pregnancy/Childbirth: Pregnancy and/or childbirth could be determined by the grantee to be compelling personal circumstances if the member requests it. The program cannot require a member to justify wanting to leave a term of service for pregnancy. Likewise, a program cannot require that a member leave their term of service due to a pregnancy – that would be an instance of discrimination on the basis of gender in violation of AmeriCorps' anti-discrimination policy. A full-time member might qualify under the Family Medical Leave Act if the member is covered, or the program could suspend the member so that the member can return some time in the future to complete their term of service.

Members released for compelling personal circumstances qualify for a pro-rated education award if they have served at least 15% of the service term and have been performing satisfactorily. Members must also clearly communicate with the program regarding the circumstances necessitating an exit for compelling personal reasons and must follow up with program requests for documentation and completion of other exit procedures. Members must successfully complete all exit forms and provide documentation of the compelling circumstance to qualify for any portion of an education award for which they may be eligible. Early termination must be approved by IDHS-Serve Illinois, in advance of the exit in eGrants.

Compelling Personal Circumstance Exit - Welfare to Work or Member Employment.

Welfare to Work - In general, members leaving a service term for employment prior to completing all the requirements would be an exit for cause but there are exceptions. One of the reasons a Compelling Personal Circumstance (CPC) exit is allowed for in the AmeriCorps regulations is due to a member transitioning from welfare to work. Programs wanting to offer this as an option to members who are exiting early from their term of service need to ensure they have documentation in the member file to support this determination. For a member to be released for CPC for this reason, the program would need to determine that the individual was receiving welfare prior to becoming a member and had obtained employment as part of an effort to become self-sufficient. The employment must be enough to meaningfully reduce their utilization of federal assistance program(s). Welfare/federal assistance programs include: TANF/SNAP, WIC, HUD housing programs including Section 8, SSI/SSDI, cash assistance (FIP and RCA), Medicaid, Medicare, Hawk-I/S-CHIP, Unemployment Insurance, Childcare Assistance, and other Federal Need-Based Assistance.

Promotion of AmeriCorps Member Employment - Additionally, the AmeriCorps regulations allow members to be given a CPC exit if they exit to accept an employment opportunity after having served in a program that includes in its approved objectives the promotion of AmeriCorps member employment. Currently, AmeriCorps does not allow for programs to choose member-focused performance measures for their approved grant application and therefore IDHS-Serve Illinois will use other methods to determine if a program is meeting the threshold of promoting member employment as an approved objective. These could include:

- Program narratives that demonstrate that the program will meet employment-related funding priorities such as by creating workforce pathways for AmeriCorps members, including deliberate training, certifications, and hiring preferences or support;
- Programs that articulate significant member employment-related goals in alignment with IDHS-Serve Illinois priorities application form.

To be eligible for this type of CPC exit, the program must have a policy supporting CPC exit for employment based on intentional program activities and specific member criteria. For example, the program must demonstrate that its efforts to promote member employment go

beyond the standard training and professional development that all Illinois AmeriCorps programs are expected to provide to members. Additionally, the members considered for such exits must have served for a sufficient period of time to attribute their successful offer of employment to skills and opportunities gained through their AmeriCorps service. The criteria for exiting a member successfully for employment, including the amount of time to be served and the trainings/certifications to be completed, should be established in the program's Member Exit and Payroll Policy. Programs wishing to incorporate this type of CPC exit should consult with their program officer in developing their policy. Prior approval of the policy must be received in advance of any CPC exits for employment.

Early Termination/Unsuccessful Completion for Cause

Members are released for cause if they do not successfully complete their term of service, for any reason that does not qualify as a compelling personal circumstance. Disciplinary reasons for termination are determined at the program level and outlined in the member service agreement. All members who complete less than 15% of their term of service must be released for cause in eGrants/MyAmeriCorps Portal.

An important distinction for members who are released for cause relates to how the programs answers the question "Did the member perform satisfactorily (complete all assignments, tasks, and projects)?" Members who are exited for cause but with satisfactory performance according to this question are eligible to serve in AmeriCorps again. However, if a program indicates that a member did not perform satisfactorily, then the member is not eligible for future service. Therefore, it is important for programs to have clearly defined criteria regarding how they will evaluate whether a member performed satisfactorily or not, and to consistently apply those criteria.

Any individual released for cause, for any reason, is required to disclose the release when applying for any subsequent term of service. Failure to disclose past exits for cause will render an individual ineligible to receive the AmeriCorps education award, regardless of whether that individual successfully completes the subsequent term of service.

Approval and Documentation for Exits for CPC, for Cause or Early Exits.

All programs that have members terminate for compelling personal circumstances, or two weeks or more prior to the expected end date for any reason, must notify their IDHS-Serve Illinois program officer for approval. The form must be submitted to the program officer within five (5) business days from the program's awareness of the termination. The form includes basic information and requires that programs inform the Commission of the reason for the termination, whether the member is eligible for a pro-rated education award, and whether the program intends to refill the slot (if applicable). When requesting IDHS-Serve Illinois approval for a Member's early exit from the program, they must complete the [Member Early Exit Form](#). Full documentation of the reasons for the early exit must be maintained in the member's file.

The program must not terminate the member in the eGrants/MyAmeriCorps Portal until the program officer has approved the request. If there are concerns regarding the circumstances of the termination, this will allow corrections to the Exit Form to be made prior to the form being downloaded from the eGrants/MyAmeriCorps Portal to the Educational Trust/SPAN.

Members must not be terminated early for compelling personal circumstances unless they have cooperated with the program during their term and they continue to meet program requirements for a successful exit (i.e., submitting final timesheets, participating in a final evaluation, providing CPC documentation, and completing other program exit procedures). Members exiting early for cause, for any reason, should also be given the opportunity to participate in the program exit process.

Member Exits in the MyAmeriCorps Portal

All members must be exited electronically in the Portal as this is the official system of record for AmeriCorps. As the program is managing the member exit process, they should be mindful of AmeriCorps' 30-day exit requirement between the member's exit date and the completion of the eGrants exit process and allow adequate time to collect information and record it in the Portal (as needed). Prior to exiting a member, it is recommended that programs ensure that all required documents are included in the member's file. That will enable the program staff to attempt to obtain any missing documents prior to exiting the member.

- The program should be aware that failure to fully complete the member exit form may result in education award costs being questioned and recouped from the program during audit. Therefore, programs should make every effort to have a signed member exit form (electronic signature in eGrants is acceptable) for all members, particularly those who receive an education award, including those that completed their service successfully and those who departed for compelling personal circumstances.
- All members must complete the program's exit process. A member who does not fully complete the exit process will be deemed not to have met program requirements and will, therefore, be ineligible for an AmeriCorps Education Award (even if they complete all other aspects of the program successfully).

Members that Leave Without Completing the Exit Process

If a member leaves their term of service without completing the appropriate electronic exit forms, the program should make several attempts to contact the member to complete the forms. Programs should be mindful of the AmeriCorps 30-day requirement for exits as they determine the policies for these situations. Timelines and contacts made with members should allow adequate time to make several contacts and exit the member within the 30-day timeframe.

Member Exit Paperwork/Forms

Programs are required to attempt to obtain exit paperwork from members. The communication to the member should provide instructions on completing the exit and

provide a specific timeline in which the member should complete the exit. IDHS-Serve Illinois recommends that at least three (3) attempts are made to contact members and at least one of the contacts should be through the mail (US postal service, UPS or another carrier). All these attempts should be documented in the member file – for example, copies of email messages, copies of letters/memos, copies of certified mail return receipts, and written notes documenting phone or text messages are examples of appropriate documentation for this purpose. If, despite these attempts, the program is unable to obtain the completed exit form, the program will need to exit them in the Portal. They should attach documentation of their contact attempts to the paper exit and make a written notation on the exit form itself saying, “The program was unable to obtain a completed exit from the member.” This message should be signed and dated by program staff and all these documents should be maintained in the member’s file.

Confidentiality of Member Early Exit Rationale

Information in the member records, especially related to reasons why members must be exited early from their program, may be sensitive and confidential. IDHS-Serve Illinois staff and contractors are aware of this requirement and will maintain confidentiality by not disclosing information except to another authorized person as allowable under federal and state law.

Refilling Slots

AmeriCorps Conditions for Refilling Slots

The following conditions, established by the Corporation, must be adhered to by all Illinois AmeriCorps programs regarding refill of member slots vacated by members who exit early. Programs must note that once a member is exited with a partial education award, the remaining portion of that award is not available for use.

- Programs may replace any member who terminates service before completing 30% of his/her term provided that the member who terminates is not eligible for and does not receive a pro-rated education award.
- Only fully enrolled member service categories may be refilled. For example, programs may only use a refill slot of a full-time slot if all other full-time slots are filled.
- Programs may not refill the same slot more than once.

Refill Deadlines

Full Time Members within 90 days of Program Start:

- If a full-time member terminates within 90 days of the program start-date, the refill must occur. A program should discuss the timeline for reporting with the IDHS-Serve Illinois program officer.

- If a full-time member terminates after 90 days, a slot conversion request must accompany the termination request.

Less than Full Time Members and Full Time after 90 Days of Program Start:

- For all part-time members and for any full-time members that terminate after 90 days of the program start-date, the refill must occur in time to allow for the member to complete their term of service within 90 days of the program's original grant agreement end date.

Program officers may approve waivers to these deadlines when the program demonstrates good cause and that the extended due date would still meet requirements for allowing the member to reasonably fulfill the term (hours and length) within the allowable grant end date.

AmeriCorps Suspension of Ability to Refill Slots

AmeriCorps will suspend refilling for all AmeriCorps programs nationwide if either:

- Total AmeriCorps enrollment reaches 97% of awarded slots.
- The number of refills reaches 5% of awarded slots.

If refills are suspended, this typically occurs near the end of the IDHS-Serve Illinois AmeriCorps program year.

Ineligibility to Refill Slots

Programs that have special grant conditions under 2 CFR §§ 200.208 or 200.339 are not eligible to refill slots. (These are programs that have a history of poor performance, are financially unstable, have inadequate management systems, have not complied with previous grant awards and/or not otherwise responsible.)

Organizations will be subject to evaluation for qualification to refill by AmeriCorps based on the results of outcomes of Inspector General Audits, site visits and oversight by AmeriCorps program and grants offices.

Other Member Management Requirements

Per the [AmeriCorps 2024 Terms and Conditions](#), there are several *required Litmos* trainings to include;

- National Service Criminal History Check Training
- Key Concepts of Financial Grants Management Training
- Fraud Awareness Training for AmeriCorps Grantees

We also have a resource, [On3Learn](#) which we highly recommend program staff and members utilize. This is a resource free to programs to help with training needs and we at Serve Illinois track monthly usage.

Member Records

All Illinois AmeriCorps programs will use the reporting systems or forms for member management and recordkeeping as instructed by IDHS-Serve Illinois and/or AmeriCorps. Programs must complete and submit member-related records to IDHS-Serve Illinois or AmeriCorps in accordance with this manual, reporting instructions, grant agreement, and Terms and Conditions. Programs should retain copies of these records, forms, and messages [electronically (as allowable under the AmeriCorps electronic records retention policy) or in hard copy] for review in case of audit or site visit. If required forms are not included in the member records, AmeriCorps or IDHS-Serve Illinois could recapture member costs from the program.

Confidential Member Information

The program must maintain the confidentiality of information regarding individual members. Programs may release aggregate and other non-identifying information and are required to release member information to IDHS-Serve Illinois and AmeriCorps, and its designated contractors. The program must permit a member who submits a written request for access to review records which pertain to the member and were created pursuant to the grant.

Use of Legal versus Preferred Name

Official AmeriCorps member records (such as National Service Criminal History Checks, eGrants/My AmeriCorps enrollment and exit, IRS tax forms, etc.) must use the name and gender as shown on the member's government-issued identification. If a member legally changes their name during their term, the member/program will need to contact the eGrants helpdesk to request the change in the eGrants system. The helpdesk will require the program/member to provide a signed copy of the member's new social security card and one of the following documents to show the proof of name change: marriage license or certification, divorce decree, court petition, or U.S. passport.

Programs should give applicants/members the opportunity to identify the name/pronouns they will use in the program (such as offering a space on the application and/or member service agreement for individuals to list their name/pronouns used, in addition to their legal name/gender). Volunteer Illinois also reminds programs that the Illinois Civil Rights Act protects against discrimination based on sexual orientation or gender identity.

Member Training

Any questions or requests for clarification regarding the information below, ongoing programmatic training, and technical assistance may be directed to the assigned IDHS-Serve Illinois program officer.

Required Training for all Members

Member Orientation

Programs must conduct a member orientation designed to enhance member sensitivity to the community and comply with any pre-service orientation or training required by AmeriCorps.

Members should attend orientation after they have been fully enrolled. IDHS-Serve Illinois there may be situations in which members may be required to complete pre-service/enrollment paperwork prior to the member start date. This activity should be limited to items that are required to complete enrollment and typically requires one hour or less. Required trainings (either by AmeriCorps or as a program requirement) must happen after the member is enrolled. Candidates that have not been enrolled may be offered optional officer hours to ask questions or interaction with Alumni or current members as a way to keep the candidate engaged prior to the start date. Member Orientation should include, at a minimum, these items should be covered during orientation and explicitly listed on the member orientation agenda:

- Member rights and responsibilities, including the Program's code of conduct,
- Prohibited activities and AmeriCorps Non-displacement/Nonduplication guidance (including those specified in the regulations). Please Note: There is an increased emphasis on ensuring that all members are trained on prohibited activities, so be sure that adequate time is devoted to this topic on the orientation agenda.
- Requirements under the Drug-Free Workplace Act (41 U.S.C.701 et seq),
- Suspension and termination from service,
- Grievance procedures,
- Sexual harassment, other non-discrimination issues,
- National Service history, AmeriCorps, and IDHS-Serve Illinois

Training for Assigned Duties

Programs must provide participants in the program with the training, skills, and knowledge necessary to perform the tasks required in their respective projects, including, if appropriate, specific training in a particular field and background information on the community, including why the service projects are needed.

Life After AmeriCorps

Life after AmeriCorps training can be accessed through a variety of means: AmeriCorps Alums, National Service Resources, a college/university career center, etc. Several Illinois programs have collaborated on a joint Life After AmeriCorps training in recent years.

Other Member training

Training and service activities should be well designed to sustain and promote a lifelong ethic of service and civic responsibility. Training topics and suggested ideas are covered below. Training should also include structured opportunities for members to reflect on and learn from their service. The topics listed below are recommendations that programs could cover in the member training and support plan.

Documentation of training

When the mid-year Progress Report is submitted, programs may need to certify completion of trainings or plans to provide required trainings. When requesting reimbursement for training costs programs may also need to attach samples of training material with agendas.

Programs should always maintain a file containing a training agenda and a dated sign-in sheet with signatures of members who attended orientation and training sessions with as much detail as necessary for auditing purposes. IDHS-Serve Illinois will document member attendance at our trainings and provide copies of that documentation to relevant program staff for file as requested.

Programs should use sign-in sheets, webinar attendance logs, or other methods to document member attendance at and completion of program-provided member trainings. If a member attends an outside training to fulfill specific AmeriCorps program requirements, they should turn in an agenda or confirmation notice signed and dated by the training facilitator to the program for retention in the member file. In instances of virtual trainings, a member should print a screenshot to sign and date for documentation, or print/sign/date the post-training follow-up notice and materials.

Site Specific Training

Members should be provided the benefit of additional training and education opportunities relevant to their service and personal development, at the discretion of the program; however, programs should ensure that members do not spend more than 20% of their service hours receiving education or training (while technically this limit applies to member hours in the aggregate, IDHS-Serve Illinois asks programs to track on an individual basis). As with fundraising, programs are required to identify training hours separately on the member time records.

Member Management

Developing Expectations for Member Performance

IDHS-Serve Illinois encourages programs to establish a process that will ensure each member will have performance expectations developed for them prior to the start of their service. These expectations should be developed in partnership with the site supervisor and should be reviewed with each member at the beginning of the service term. Any questions and concerns members have about service activities can be discussed. The performance expectations should then be used as the basis for the mid-term and end-of-term evaluations. If changes and/or additions need to be made, those should be documented on the form and noted by both the site supervisor and the member. If the member struggles later with behavioral issues or with site-specific tasks, this document could be used to set short-term goals as part of a corrective action plan.

In the end, think about what is important in the project. Regardless of the outcome, remember the project result and the members are still our responsibility. If the program or site

supervisors do not see progress in the project, it is the program leadership's responsibility to step in. Do not lay the responsibility at the feet of the members. However, when the project goes well and is recognized, share the kudos with the members; they deserve gratitude as well!

Ensuring members have adequate materials

As with discovering whether the training plan is adequate, the quickest way to find out whether members have adequate materials and equipment is to ask them directly. While most often members will report that they have indeed had what they needed during the term, there have been cases where members have been purchasing basic supplies out-of-pocket and not seeking reimbursement for them.

Safety Awareness Training

Adequate training is of great importance. Training should provide clear guidance for member safety as well as procedures to help ensure safety. IDHS-Serve Illinois suggests that safety awareness training should occur during member orientation and reinforced during service, as determined by specific service activities. The training should also include sessions on:

- Procedures for obtaining immediate assistance in the event of an emergency, including explicit guidelines for reacting to dangerous or threatening situations;
- Becoming familiar with the community (this would be particularly necessary for members relocating to the area);
- Safe handling of equipment and tools (as appropriate but think beyond chainsaws and power tools).

The program and host site should take reasonable steps to ensure member safety during service. Programs are encouraged to set parameters for member service hours allowed per day/week/month.

To protect member safety, the program is expected to follow CDC Guidelines related to any declared public health emergency. This may include social distancing, wearing of masks (or other protective gear), providing the opportunity to serve from an alternate location on a temporary basis, and required quarantine or isolation in cases of positive tests or exposure, etc. These guidelines may change based on a variety of factors. Therefore, the program is encouraged to regularly check the CDC website for the most recent guidance and notify host sites of significant changes in CDC recommendations that impact member service. If program intends to pursue mandatory vaccination for member(s), they must obtain approval from IDHS-Serve Illinois.

Member Supervision

Member supervision is critical to the overall success of an AmeriCorps program. It is a greater challenge when all members are not co-located with the program or for members serving in a shorter term. If members are not co-located, site supervisors should develop and provide

site orientation training in addition to the program orientation the member received when they enrolled, or shortly thereafter. For members serving shorter terms, supervisors should be intentional in creating a plan for supporting members and providing feedback quickly to ensure member success. Other site supervisor responsibilities include but are not limited to:

- Supervision cooperation with programs should develop performance plans for each member.
- Supervisors should have regularly scheduled check-ins with members to review their service.
- The member position description and performance plan should clearly outline member expectations for the upcoming term.
- Any changes to the member's term, should also be made in these documents.
- Supervisors should provide feedback to the members regularly, not only on the things in the performance plan, but on other activities the member participates in – See above for help in providing feedback.
- Supervisors should be responsible for participating in the written, formal evaluation process.
- Supervisors are responsible for reviewing and approving timesheets. As a part of this responsibility, Supervisors should monitor member progress toward the completion of the term of service. Should a member fall behind, the Supervisors action would include:
 - Bringing this to the attention of the member and program staff
 - Including this situation in the member evaluation, should this occur during the evaluation period, and develop a plan to bring the member on track.
 - Ensure the member stays on track with the plan according to the schedule. If the member does not stay on track, the site supervisor should communicate with the program.
- Supervisors should participate in decisions regarding member discipline and should be communicating regularly on this topic if the program is not co-located with the member in question
- Supervisors should be communicating regularly with the appropriate program staff member regarding member supervision.

Site supervisor expectations are detailed in a Host Site Agreement. This is the agreement between the organization holding the grant agreement with IDHS-Serve Illinois, and the partner organization hosting the member. There is a resource for site supervisors that condenses the information from the Host Site Agreement that pertains specifically to the expectations for site supervisors. From the member's point of view, these are things they need to know or should be able to report in a follow-up survey or monitoring. The responsibility for these may fall on either the program or site supervisor, depending upon the program design.

- Members know how to report a problem

- Members know to whom to report a problem
- Members understand they have a grievance process and support if they feel they are being asked to do something they believe is not right or they are uncomfortable with, and they have exhausted other avenues
- Members know who their site supervisor is
- Members know the difference between their site supervisor and their program
- Members feel well supported o Members report their questions are answered in a timely manner
- Members report their site supervisor knows information about AmeriCorps or knows where to find the information
- Member report having the tools to do their service activities
- Member report having clear expectations
- Members report receiving feedback from their site supervisors and/or program staff regarding their service

Nepotism Policy

In order to avoid the presence or perception of nepotism within IDHS-Serve Illinois' AmeriCorps programs and to provide appropriate support to members, Illinois AmeriCorps programs should avoid situations in which an AmeriCorps member is directly supervised by a close relative. For this purpose, the term "close relative" includes relationships such as: parent/stepparent, child/stepchild, sibling/stepsibling, grandchild, grandparent, spouse, cousin, niece, nephew, aunt, or uncle. Additionally, if a member enrolls in a program managed by lead or key staff that is a close relative, that member should have the background check should be completed and enrolled by someone other than the relative. Illinois AmeriCorps programs are also encouraged to follow any policy their organization may have on nepotism and may impose more stringent requirements for their program.

PART FIVE

**National Service
Criminal History
Checks**

National Service Criminal History Checks Overview

AmeriCorps has strictly prescribed requirements for criminal history checks for individuals associated with their programs, which are referred to as National Service Criminal History Checks (NSCHC). The requirements, which are found in [45 CFR § 2522](#) and [45 CFR § 2540](#), include specific repositories, timelines, documentation, review, permissions, and other elements that make it highly unlikely that any background checks that an organization undertakes for other risk management purposes will meet AmeriCorps's requirements.

Program staff should review the [AmeriCorps NSCHC Resources](#) website. For those new to AmeriCorps program management, a resource is the "[Getting Started with NSCHC Resources](#)" available on the AmeriCorps website.

At least two staff must complete the required NSCHC Training eCourse, on LITMOS, annually and maintain their certificates of completion for future review.

IDHS-Serve Illinois also encourages programs to seek specific guidance from their program officer as they conduct their first checks and to follow-up with their program officer if they come across any unusual situations. Penalties for discrepancies in the criminal history check process can be costly and having to re-run checks can be time consuming and costly, too.

Organizations may conduct additional criminal or other background checks on members or grant staff in accordance with organizational policy. In some cases, costs of additional checks may be eligible grant costs if program policy dictates that criminal history results need to be reviewed by the program as part of member selection and these results are not provided through the mandatory NSCHC process.

National Service Criminal History Checks Requirements (45 CFR § 2522 and 2540)

Programs must conduct and document a National Service Criminal History Check (NSCHC) on individuals selected to work or serve in an NSCHC-required grant. NSCHC-required grants include those with individuals who serve as AmeriCorps State and National members and with individuals who work in a position in which they will receive a salary under a cost reimbursement grant.

AmeriCorps refers to these individuals as "covered" individuals, meaning they are subject to the NSCHC. The requirement for an NSCHC applies when an individual is paid wholly from federal share, wholly from matching dollars, or from a mixture of federal and non-federal funds.

NSCHC requirements do not apply to staff of fixed-amount grants. Fixed Amount programs should contact their IDHS-Serve Illinois program officer with questions.

Three Part Check

All individuals starting work or service in an NSCHC-required grant must complete a three-part check. The NSCHC must be conducted, reviewed, and an eligibility determination made by the program based on the results of the NSCHC **no later than the day before the individual begins to work or serve** on an NSCHC-required grant. Work or service hours include AmeriCorps funding orientation and training activities. The three parts are:

- A nationwide name-based check of the National Sex Offender Public Website (NSOPW) at www.NSOPW.gov; AND
- A name- or fingerprint-based search of the state criminal history record repository or agency-designated alternative for the individual’s state of residence and state of service/work; AND
- A fingerprint-based check of the FBI criminal history record database through the state criminal history record repository or agency-approved vendor.

Individuals Exempt from NSCHC

The following individuals are exempt from NSCHC:

- Individuals who are under the age of 18 on the first day of work or service. ○ If an individual is serving a consecutive term and turns 18 before the start of the subsequent term of service, NSCHC must be conducted prior to the subsequent term (when they will be 18).
- Individuals whose activity is entirely included in the grant recipient’s indirect cost rate or cost allocation policy or plan.
- Staff on fixed-amount grants. However, grant recipients are strongly encouraged to incorporate suitability screening and institute a holistic framework for safeguarding beneficiaries of service.

In most cases, contractors are not considered covered individuals for NSCHC. AmeriCorps applies the NSCHC requirements based on the legal distinctions between subawards (also known as subgrants) and contracts as defined in the [Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards](#). Organizations may colloquially refer to subawards as contracts. However, the two are legally distinct and the NSCHC requirements apply to subawards, not contracts. Guidance on how to determine whether you have entered into a subaward or a contract with another entity is available at [2 CFR § 200.331](#) Subrecipient and contractor determinations.

NSCHC Waivers and Pre-Approved NSCHC Waivers

Details for the Pre-Approved “Use of Truescreen for NSOPW and/or State Checks,” “National Fingerprint File States” and “Disability Accommodation Exemption for FBI Fingerprint Checks” can be found in Appendix A of the AmeriCorps [NSCHC Manual](#). If a program is unable to abide by the NSCHC rule, AmeriCorps can waive requirements for good cause or any other lawful basis. Note that waivers are granted on an individual or time-limited basis, and waivers are not retroactive. Programs are expected to evaluate and implement methods for completing all check components prior to the day an individual begins work or service. This includes incorporating check processing times and anticipating possible delays of up to 30 days.

AmeriCorps has a few pre-approved NSCHC Waivers that impact the NSCHC requirements listed above. Programs can use these to comply with AmeriCorps requirements without additional written approval from IDHS-Serve Illinois and AmeriCorps. AmeriCorps may add or remove pre-approved Waivers at any time and maintaining awareness of current pre-approved Waivers is the responsibility of programs. The use of pre-approved NSCHC Waivers should be clearly described within the program’s NSCHC policies and procedures. When a pre-approved Waiver is revoked, the Waiver does not apply to any individuals in covered positions who begin work or service after the expiration date of the pre-approved Waiver. At the time of publication of this manual, AmeriCorps has pre-approved Waivers in place related to the following situations (see the Appendix A of the NSCHC Manual):

[Use of Truescreen for NSOPW and/or State Checks](#)

This AmeriCorps NSCHC Waiver allows programs to utilize the Truescreen vendor for NSOPW and/or State Checks. Programs must complete Truescreen checks for individuals in covered positions before the start of work or service. A complete Truescreen check is defined as a check that is adjudicated by the grantee. Individuals may not begin work or service until the day after the Truescreen checks are complete. Truescreen does not provide information for certain states and territories (see list below) and so programs using Truescreen will not be required to get a check from an unavailable state/territory for individuals in a covered position if they have 1) obtained an NSOPW check from Truescreen, 2) obtained any required state checks that are available from Truescreen, and 3) conducted a fingerprint-based FBI check.

[Disability Accommodation for FBI Fingerprint Checks](#)

AmeriCorps will exempt the fingerprint FBI check requirement for individuals in covered positions if conducting a fingerprint check is a physical impossibility because of disability, such as the absence of limbs. The grantee is still required to conduct NSOPW and name based state check(s) on the individual.

Name and Identification Checks

Programs must run all components of the check undertaking reasonable due diligence to determine the current first and last name(s) of the individual to conduct the name-based checks. Documents used to verify an individual's identity must be consistent with sources described in the program's NSCHC policies and procedures (sources may include but are not limited to government issued photo IDs and federally issued income statements like a social security income statement for AmeriCorps Seniors volunteers, etc.).

If the format of the individual's first and/or last name(s) on their identification documentation is not consistent with the member's signature, is different on their social security card, or otherwise varies, the program should use the name as determined through the program's identity and name verification policies and procedures. (For example, if the member signs their name "O'Toole", but "OTOOLE" is on their ID, the program may use OTOOLE for NSCHC, or if the name is "McGowan" on their Social Security Card, but ID says "MC GOWAN", the program may check an additional ID to determine and document which version of the name to use to run the checks.) Because the member may type in their own name for some checks, it is the program's responsibility to verify the name in the system and if it does not exactly match the first and last name(s) and ID as determined by the program policies, the program should run the check again with the preferred spelling. Checks that are misspelled or do not match the program policy on identification may result in disallowance in accordance with Awardee Guide to NSCHC Enforcement of Cost-Based Disallowance Effective January 26, 2022 (included in the NSCHC Manual).

While official AmeriCorps member records (such as National Service Criminal History Checks) must use the documented name and gender of the AmeriCorps applicants/members, programs should give applicants/members the opportunity to identify the name/pronouns they will use in the program (such as offering a space on the application and/or member service agreement for individuals to list their name/pronouns used, in addition to their legal name/gender). IDHS-Serve Illinois also reminds programs that the Illinois Civil Rights Act protects against discrimination based on sexual orientation or gender identity.

Entering a middle name or initial in the NSOPW website search has the potential to change the results and/or can limit results and should not be used in the same search. Adding information beyond the first and last name(s) may result in a noncompliant check for which you may face financial consequences.

Timing of Checks and Definitions

All NSCHC components must be conducted, reviewed, and adjudicated, no later than the day **BEFORE** a person begins to work or serve on an NSCHC-required grant. Work or service hours include AmeriCorps funded orientation and training activities.

For three-part checks, it is required that the NSOPW, state, and FBI checks are completed and adjudicated no later than the day before service/work begins.

- Completion means the full results for a specific component of the check are available for a program official to adjudicate to ensure the results do not preclude the prospective member/staff from serving/working in the program.
- Adjudicate means to review the results or summary information and consider those results in selecting a person to serve or work in the program. Programs are required to develop a written policy about how criminal history check results will be adjudicated at their agency based upon program design.

Prior Authorization and Acknowledgement of Selection Process

The NSOPW is a free, public, name-based check and therefore programs are not required to obtain permission from covered individuals prior to running that component of the NSCHC. However, for the State and FBI components of the check the program must obtain prior authorization/consent from the covered individual to conduct the check. Agency-approved vendors incorporate their required authorization/consent language into their systems, but other repositories (such as the Illinois State Policy) may have their own required forms.

In addition to securing prior authorization required for each specific check component, programs must require individuals to sign an acknowledgment form that gives the program authority to conduct the NSCHC and documents the individual's understanding that final selection into the program is made following the program's review of the NSCHC results in accordance with its selection policies. Required components of this acknowledgment form are that the covered individual:

- Has been informed of the national service criminal history check to be conducted,
- Gives permission for the program to conduct the check,
- Was informed of the program policy on adjudication of criminal history findings,
- Is aware that participation is contingent upon criminal history review and that they have the opportunity to challenge the results. Challenges may be based on the assertion that there are errors within the report, but not on the program's decision about whether the individual's record disqualifies him/her from service/work in the program.

Programs must follow organizational procedures/policies that describe how the criminal history records are considered as part of member/staff selection. Program policies/procedures must describe how the program will evaluate individuals who have findings on their background check, to

determine whether they will serve/work within the program. In cases in which the individual has a finding on any check, a best practice is to ensure that each finding has a notation by it demonstrating that program staff reviewed and considered this finding. The type of notation can be defined by the program within their NSCHC Procedures and Policies. Furthermore, IDHS-Serve Illinois recommends that each page of NSCHC results have a staff member signature or initials and the date for documentation purposes. Again, the program should define their suitability criteria within their NSCHC Policies and Procedures. In doing so, the program must safeguard the results of the checks and the personal information they contain.

In developing their policy and/or procedures, programs should be mindful of their requirements under Civil Rights law and related guidance from the U.S. Equal Employment Opportunity Commission (EEOC) on avoiding discrimination when considering the criminal record for purposes of employment or national service. Programs should consider that arrests alone are mere allegations, and that actual criminal convictions or evidence of conduct underlying an arrest, are the relevant indicators of an individual's fitness. Additionally, the EEOC suggests that policies consider:

- The nature and gravity of the offense or conduct;
- The time that has passed since the offense, conduct and/or completion of the sentence; and
- The nature of the position held or sought.

Programs must also be mindful of Illinois Senate Bill 1480 which imposes new restrictions and obligations on the use of background checks. Specifically, to legally consider an applicant's conviction record under the law, one of the two following conditions must be met:

- There must be a substantial relationship between one or more of the previous criminal offenses and employment sought or held; or
- The granting or continuation of the employment must involve an unreasonable risk to property or to the safety or welfare of specific individuals or the general public.

Programs must notify individuals in the case of non-selection for NSCHC reasons. The individual may challenge the factual accuracy of the results. The process for challenging is driven by the AmeriCorps-vendor or by organizational policies.

Ineligible Individuals

In addition to the eligibility criteria that each program establishes, AmeriCorps policies explicitly exclude prospective members/staff from service/work on an NSCHC-required grant for the following reasons. If the prospective individual:

- Is registered, or required to be registered, on a state sex offender registry or the National Sex Offender Registry;
- Has been convicted of murder as defined in 18 U.S.C.;
- Refuses to consent to the National Service Criminal History Check, or
- Makes a false statement in connection with a program's inquiry concerning the individual's criminal history. (Further guidance from the Agency on what is considered a "false statement" is available in the Agency NSCHC Manual.)

Frequency of NSCHC

If a person serves consecutive terms of service with the same organization and does not have a break in service longer than 180 calendar days, then it is not necessary to redo the NSCHC as long as the check is compliant with the current NSCHC rule. NSCHC results cannot be transferred to another

grantee, so individuals that move to an NSCHC-required program with another organization are subject to a new NSCHC. If a member or staff legally changes their name during their service or employment and there is no break in service or work, there is no requirement to recheck the NSCHC.

Please refer to the AmeriCorps site for detailed guidance on [National Service History Checks](#).

Documentation of Checks

Programs are encouraged to use the [National Service Criminal History Check \(NSCHS\) Manual](#) to show that all necessary steps in this process are completed on time and as required. For individuals under the age of 18 before the start of work or service, the program must certify the applicant's age.

Programs must maintain documentation for covered individuals in the member or employee's file, or electronically, as appropriate. IDHS-Serve Illinois strongly recommends that NSCHCs are managed and documented through the organization or program headquarters and not through the sites. NSCHC results must be maintained confidentially.

For members continuing service with a break of less than 180 days, the program will not re-run the checks, however, the NSCHC files will be transferred to the most recent member file. To do so, the program staff will simply move all NSCHC documentation into the most recent member file and complete a new NSCHC Documentation Checklist for the subsequent term. In addition, the program will include a memo to the prior year's file where the NSCHC documentation was removed. The memo should indicate that the individual continued service or work and that their NSCHC documentation has been moved to the most recent program year file.

For staff continuing on the AmeriCorps grant from one program year to the next with a break of work less than 180 days, the program will not re-run checks, do not need to update the NSCHC documentation checklist annually, and should not make any changes to the staff's original NSCHC Checklist.

Programs must retain copies of the results of NSCHC. However, pursuant to State Code Chapter 692.2, the program may not disseminate the results of criminal history checks conducted by the Division of Criminal Investigation. Only the Department of Public Safety may disseminate criminal history data maintained by the department to persons who are not criminal or juvenile justice agencies. Therefore, the program should never send state or FBI criminal history results to any other entity, even IDHS-Serve Illinois or AmeriCorps. State law allows IDHS-Serve Illinois and other oversight entities to view the results, but not to make copies or otherwise disseminate the results. If a program ever receives a request to copy or send DCI background check results, they should cite Illinois Code 692.2 as the reason the results cannot be released. Contact the assigned program officer for assistance, if needed.

Monitoring NSCHC

IDHS-Serve Illinois will conduct regular monitoring on NSCHC for members and covered staff, based upon program risk and monitoring level, to ensure compliance. In case of monitoring, the actual NSCHC check results and adjudication documentation must be available for review by IDHS-Serve Illinois staff or our agents. IDHS-Serve Illinois will monitor that the program is following its own policies and procedures.

AmeriCorps provides enforcement guidance in the NSCHC Manual document that describes National Service Criminal History Check (NSCHC) noncompliance, potential administrative consequences for noncompliance, and how and when AmeriCorps will implement specific administrative corrective action or enforcement for NSCHC noncompliance. IDHS-Serve Illinois will follow the enforcement actions and remedies outlined in the NSCHC Manual issued by AmeriCorps when monitoring programs in relation to their NSCHCs or provide advance notification to programs of any variances. If a program determines that a currently serving member is ineligible based on the results of their NSCHC or if the program discovers the name of the check was not run accurately, this must be immediately reported to IDHS-Serve Illinois.

The Monitoring and Enforcement section of the NSCHC Manual outlines several enforcement steps that will or may be taken based upon the nature of the noncompliance, such actions include:

- **Cost Based Disallowance:** Refers to the disallowance of costs associated with an eligible individual's work or service during the period of noncompliance, including salary/stipend/living allowances (as applicable) and FICA. Where costs were paid with matching funds, the disallowance of those matching costs may also result in disallowance of the related Federal funds. Cost-based disallowance will not include disallowance of AmeriCorps member hours.
- **Grant Suspension:** Hold on all grant activities, including member service.
- **Grant Termination:** Ending of the grant award, in whole or in part.
- **Manual Hold:** Required review of documentation prior to future payments or restriction of access to AmeriCorps funding.
- **Requiring the Use of Agency-Approved Vendors:** Truescreen and Fieldprint mandated to be used for re-checks and/or for the remainder of the grant period.
- **Corrective Action to cure deficiencies:** Conduct and adjudicate all improper checks.
- **Other actions:** As determined by IDHS-Serve Illinois or AmeriCorps to strengthen compliance with NSCHC requirements.

PART SIX

Fiscal Management

Overview

The program has full fiscal and programmatic responsibility for managing all aspects of grant and grant-supported activities, subject to the oversight of IDHS-Serve Illinois. Grant and financial management are inextricably linked. That is, poor member and program management have negative impacts on financial management because member/program compliance issues often result in disallowed costs.

The program is accountable to IDHS-Serve Illinois and AmeriCorps, for operation of its Illinois AmeriCorps Program and use of AmeriCorps funds. Although programs are encouraged to seek the advice and opinion of IDHS-Serve Illinois staff on circumstances that may arise, such advice does not diminish the program's accountability for operating decisions.

It is the responsibility of all staff to be aware of effective grants and financial management standards, be good stewards of federal resources by practicing strong financial, grant, program, and member management, and to continually improve the systems and practices used in these areas. IDHS-Serve Illinois staff are committed to share updates, resources, and training on relevant topics impacting financial management. All financial staff are encouraged to participate in relevant calls and trainings.

Program staff play an important role in financial management of the AmeriCorps grant, such as budget development, managing program expenditures, budget monitoring, and financial reporting. Ongoing communication between program and financial staff is essential for strong program and financial management and compliance. Some key elements include:

- **Connecting the budget/expenditures to program objectives.**
Example: Ensuring member trainings costs are connected to the approved grant objectives.
- **Identifying and correcting discrepancies.**
Example: Reviewing financial reports and noting if something is inadvertently charged to AmeriCorps that is related to another program or which should be under admin costs.
- **Understanding requirements and applying them correctly and consistently.**
Example: Knowing that organizational background checks will not meet AmeriCorps requirements and ensuring that the correct checks are paid for and conducted.
- **Identifying trends and issues that impact the budget.**
Example: Knowing that increases in living allowances are necessary in order to recruit and retain members. Informing key staff and working to raise additional funding, if needed.
- **Proactively solving budgetary issues.**
Example: Identifying that travel costs are much higher due to higher gas prices and proposing adjustments in other areas of the budget to account for this.
- **Identifying risks and mitigating or accepting calculated risks.**
Example: Having members working with chainsaws increases program insurance costs, but if there is an accident, the costs will increase further. Therefore, you ensure members receive advanced chainsaw training and establish safety standards.

- **Establishing budgetary priorities (in conjunction with program priorities).**
Example: You decide to prioritize paying for an additional member healthcare benefit to cover mental health services because you have had several members leave the program for this reason and member retention/health/wellness are a program priority.
- **Identifying and notifying relevant parties of mistakes/errors that impact the budget.**
Example: You notice that no funds were included for upgrading computer equipment and your technology device is outdated, so you bring this to the attention of the financial staff.
- **Timeliness and accuracy of reporting.**
Example: You send a reminder to your accountant based on the reporting deadlines in the Program Manual and Weekly Update message from IDHS-Serve Illinois.
- **Site interactions, including reporting and collecting match and development of site agreements, if applicable.**
Example: You realize that the program costs are increasing and therefore, you recommend that the program increase host site fees as one way to help cover these costs.
- **Sharing information conveyed from IDHS-Serve Illinois or AmeriCorps pertaining to key budgetary or programmatic elements.**
Example: You send an update to your accounting team when AmeriCorps announces a change that impacts the budget (such as all staff needs a three-part NSCHC).
- **Authorizing, approving, and coding of program costs (including allocation).**
Example: You review the office supply receipt to ensure that only AmeriCorps related costs are charged to the AmeriCorps grant.

Pertinent Financial Terms and Concepts

Grantee/Recipient The party or parties to a grant funded, in whole or in part, with Federal financial assistance, other than the Prime Grantee/Recipient, and includes grantees, subgrantees, Subrecipients and borrowers. For the purposes of Transparency Act reporting, grantee does not include Vendors.

Prime Grantee/Prime Recipient IDHS-Serve Illinois is the prime grant or prime recipient for the AmeriCorps funds.

Subaward AmeriCorps grants are considered federal pass-through grants to “subrecipients.” While this manual uses the term “program” for the purposes of federal grant management, it is important to note that programs are considered “grantees,” “subgrantees,” or “recipients,” or “subrecipients.”

National Service Criminal History Check (NSCHC) The required process by which members or staff who are included on the grant budget undergo an examination of their criminal history using a specific process as mandated by AmeriCorps.

Fixed amount grants (Fixed Amount and Education Award Only Grants) Grants of this type are exempt from the Cost Principles, which means that the amount AmeriCorps awards is not based on a line-item budget and programs are not required to maintain documentation to support the allowability of expenditures charged to federal or matching grant funds.

Reasonable Assurance A concept that acknowledges that control systems should be developed and implemented to provide management with the appropriate balance between risk of a certain business practice and the level of control required to ensure business objectives are met.

Program Income Program income is revenue earned as a direct result of the grant-funded program activities during the award period and must be retained by the Grantee and used to finance the grant's non-AmeriCorps/match share.

Cost Allocation policy A narrative description of the procedures that the organization will use in identifying, measuring, and allocating incurred costs when they benefit more than one program administered by the organization. A cost allocation policy may include a written cost allocation plan that details how various costs will be handled.

Federal Grants Management Requirements (2 CFR 200)

The program and financial staff are responsible for managing project costs related to the AmeriCorps grant. Staff must be vigilant; ensuring costs are allowable under applicable regulations and policies, properly allocated to the correct project, and are considered necessary and reasonable. In addition, costs must be treated consistently throughout the organization and across programs.

Accounting System (2 CFR 200.302)

The program shall establish and maintain a financial management system based on sound management policies and procedures to effectively control and account for all grant funds, including maximum segregation of financial duties.

The program and financial staff should ensure that the organization has in place and maintains financial management systems that include:

- Standard accounting practices,
- Sufficient internal controls,
- A clear audit trail, including a crosswalk to detail cost categories in your financial records that may vary from AmeriCorps categories. (For example, your accounting system may have a telephone expense category, but telephone is not a category for the AmeriCorps budget, so those costs are coded to supplies for the purposes of the AmeriCorps grant.
- Costs should be treated consistently throughout the grant year and detailed in policies/procedures, including a written cost allocation policy and procedures (as necessary),
- The ability to distinguish expenditures attributable to this grant from expenditures not attributable to this grant,
- Accounting for each award/grant separately,
- Identification of costs by programmatic year and by budget category, and
- Differentiation between direct and indirect costs or administrative costs.

Reasonable, Allowable, Allocable (2 CFR §200.404; 2 CFR § 200.405; 2 CFR § 400.403)

Procedures shall be established for determining reasonableness, allocability, and allowability of costs, in accordance with applicable cost principles and terms of the grant as defined in the grant agreement. Procedures shall be applied consistently across all programs.

Reasonable (2 CFR § 200.404)

To be reasonable, a cost must meet the following criteria:

- What a prudent person would consider reasonable under the circumstances at the time the cost is incurred;
- Is generally recognized as ordinary and necessary for the operation of the grant or program;
- Is consistent with sound business practices, established laws and regulations, and terms of the program being charged;
- Is consistent with the market price for comparable goods or services; and
- Any deviation from established practices by the entity is explained and justified.
- Be authorized, or not prohibited, under state or local laws or regulations.
- Withholding federal or state limitations or exclusions set forth (for example, maximum costs or unallowable funds);
- Be accorded consistent treatment through application of Generally Accepted Accounting Principles (GAAP) appropriate to the circumstances.
- Not be allocable to or included as a cost of any other program in either the current or prior period;
- Be net of all applicable credits; (for example, if you receive a discount on an item, you can only charge the discounted price to the grant, not the full price that you did not pay.)
- Be adequately documented.

Allocable (2 CFR § 200.405)

A cost that can be assigned or charged to one or more activities or programs based on benefits received or in a reasonable proportion to benefits received, if the exact benefit basis cannot be determined. A shared cost that is allocable to a specific program may not be shifted to another program.

A shared cost is allocable:

- Based on its relative benefits received
- If it is treated consistently with other costs incurred for the same purpose in similar circumstances and if it:
 - is incurred specifically for the award,
 - benefits both the award and other work, and
 - can be distributed in a reasonable proportion to the benefits received is necessary to the overall operation of the organization.

Allowable (2 CFR § 200.403 and General Terms and Conditions)

To be allowable, costs must:

- Be necessary and reasonable for the proper and efficient administration of the Illinois AmeriCorps Program,
- Conform to grant award limitations or cost principles,
- Be consistent with policies and procedures that apply to the federal and non-federal activities of the organization,
- Be included in the approved program budget,
- Be given consistent treatment,
- Be in accordance with Generally Accepted Accounting Principles (GAAP), g. be adequately documented, and
- Not be included as a cost or used to meet cost sharing or matching requirements of any other federally funded program. (Unless explicitly allowed by the other federally funded program.)

Additionally, AmeriCorps/ IDHS-Serve Illinois' AmeriCorps State programs have some specific conditions for certain types of costs, for example meal costs for member or site supervisor training sessions. See below for details about allowable food/beverage items. Programs may use non-grant funds to provide food/beverages during training events that are fewer than six hours.

Unallowable Costs (2 CFR §§ 200.400 - 200.476)

Care should be taken to ensure that unallowable costs are not charged to the federal share or reported as program share/match to the AmeriCorps grant. Program officials should review the Uniform Guidance to determine whether a cost is allowable. In addition to the unallowable costs referenced in the regulations, other specific activities are unallowable for AmeriCorps:

- Fundraising by staff
- Generally, writing of the AmeriCorps grant (2 CFR 200.442)
- The value of nonprofessional volunteer hours as match
- Member unemployment (Illinois-specific ruling)
- Costs that support prohibited member activities
- Costs to support member activities that are not included in the approved grant narrative
- Costs for members serving outside of their service agreement (either the start/end dates or the activities outlined within)
- Costs for members that are incurred before the individual is successfully enrolled in eGrants (however, costs for member recruitment and NSCHC are considered ongoing and can be charged in the year they were incurred)
- Costs for staff that are incurred before the AmeriCorps NSCHC has been completed
- Costs for members or staff that are ineligible to serve/work due to results from the NSCHC
- Meal costs for staff-only planning or training sessions
- Supplies for days of service projects, unless specifically included in the approved budget
- Snacks and beverages for training sessions
- Meals for AmeriCorps grants are viewed as entertainment by the AmeriCorps Office of Inspector General and are therefore unallowable. Exceptions:
 - 1) If a staff or AmeriCorps member is in travel status (outside of the county where they live or as defined by your organizational policy),
 - 2) If members or staff are participating in an AmeriCorps training that is six (6) hours or more that is supported by an agenda and sign-in sheet,

3) If the food costs are expressly included in the approved AmeriCorps budget narrative.

Grant.Costs.

The total cost of a grant is comprised allowable direct cost, plus the allocable portion of allowable indirect costs (administrative costs), less applicable credits. Guidelines for determining direct and indirect costs allowable under grants are provided below.

Direct.Costs.

Direct costs are specific expenses related to the operations of a specific project and are readily assignable to the AmeriCorps program.

Indirect.Costs.

Indirect costs are those that are not directly identified with a program but is necessary for the general operation of the organization. Similar costs incurred for the same purpose in like circumstances must be treated consistently as either direct or indirect costs. Costs across programs must be treated consistently in accordance with the organizational policies.

Allocation.of.Shared.Costs

Shared costs are those direct costs that benefit more than one program objective; if a direct relationship cannot be established it is considered a shared cost. (See cost allocation policy in section 2.1.)

Consistent.Treatment

There is no universal rule for classifying certain costs as either direct or indirect; therefore, each item of cost for the Illinois AmeriCorps program should be treated consistently as either a direct or an indirect cost. Costs must be given consistent treatment through application of Generally Accepted Accounting Principles (GAAP) appropriate to the circumstances.

EXAMPLE: A cost (such as an audit or an accountant's time) cannot be treated as a direct cost to AmeriCorps but treated as an administrative cost to other programs operated by the organization.

Governing Documents

Both the program and financial staff should ensure that the program adheres to IDHS-Serve Illinois and AmeriCorps policies for operation of an AmeriCorps grant. Key governing documents are referenced below and incorporated in the grant agreement.

Grantee.Conflict.of.Interest.Disclosure This document is due by the grantee annually.

Code.of.Federal.Regulations

These include the Uniform Guidance (2 CFR 1-2). The federal regulations contain the cost principles, administrative requirements and audit requirements for organizations receiving federal funds. Match

Grant.Terms.and.Conditions

Terms and Conditions are the guiding principles for AmeriCorps-funded grants. These include the certifications and assurances that are agreed upon by the program at the time of application submission. Illinois AmeriCorps Programs are subject to both General Terms and Conditions and ASN

Terms and Conditions; in some cases, Special Conditions may apply and if so, they will be listed in the grant agreement.

[Notice of Grant Award \(NOGA\)](#)

The official notice of grant funding from AmeriCorps. The Notice of Grant Award is made at the Prime Grantee level and grant awards to programs are based on the NOGA.

[Notice of State Award \(NOSA\)](#)

This document is a written notification from the Illinois Department of Human Services (IDHS) to each sub-grantee (program provider) of the approved funding amount. This document will also list the requirements and conditions for receiving the award from the IDHS.

[Approved Application and Budget-Budget Narrative](#)

As submitted in eGrants. This includes the grant narrative, logic model, evaluation plan, budget, performance measures, and supporting documents.

[Uniform Grant Agreement](#)

The Grant Agreement issued by IDHS-Serve Illinois governs the grant and contains specific reporting deadlines and other details. The Grant Agreement binds the program to comply with its approved grant application and other documents which are incorporated by reference into the grant agreement.

Financial Policies and Procedures

The program and financial staff should work together to ensure that the organization has adequate policies and procedures in place for effective grant management. IDHS-Serve Illinois reviews a select group of policies and procedures as part of our regular monitoring process; however, we retain the right to request any relevant policies or procedures to support claimed costs and/or to provide technical assistance. In addition, IDHS-Serve Illinois has samples of some policies and procedures available for your use. Please contact the compliance officer if you are interested in utilizing a sample or having IDHS-Serve Illinois review a specific policy or procedure. The following are some key elements of effective financial management policies:

- Reporting process and procedures that provide accurate, current, and complete disclosure of the revenue and expenses of each grant in accordance with reporting requirements established by IDHS-Serve Illinois and AmeriCorps.
- Maximize internal controls to serve as a checks and balances system. Internal controls include segregation of duties, wherein both the program and financial staff have clear roles in approving expenditures, tracking, and recording transactions, identifying, and correcting discrepancies, maintaining documentation, etc.
- Internal cash control policies to ensure safeguarding of assets, reliability of financial information and compliance (including procedure for monitoring variances in budget, to identify why variances occurred and to make budgetary adjustments).
- Effective control system to provide reasonable assurance for the safeguarding of assets, the reliability of financial information, and the compliance with laws and regulations. The cost of a control should not exceed the benefit derived from it.
- Avoid recurring deficits and secure adequate funding to carry out mission and activities.
- Expend funds responsibly in compliance with conditions attached to funding.

- Policy for tracking in-kind match for the AmeriCorps grant. If a program uses in-kind match to provide grantee share of costs, these costs should be tracked within the organization's financial management system. If a program elects to track in-kind match outside of the financial system, a specific AmeriCorps policy must be developed and approved. Procedures for documenting in-kind match that is not tracked in the organization's financial records must also be established.
- Policy for tracking, use and reporting of Program Income (2 CFR 200.307 and 42 CFR 2541.250) Regulations require that programs fully utilize program income at the time it is earned to ensure that there is not excess program income on hand or at the end of the grant period. Programs should not request federal funds through the claim/reimbursement process if they have program income on hand. Program income on hand must be expended before federal funds are requested.
- Ensure that assets are used solely for the benefits of the organization and not personal or other gains. Program-specific funds or donor designated funds should be used for the purposes for which they are approved/designated and not shifted to support general operations or other costs.
- Code of Conduct for employees encourages ethical behavior, accountability and transparency while discouraging or prohibiting unethical behavior (such as nepotism), harassment, discrimination, breaches of confidentiality, and other undesirable, dangerous, or illegal behavior. Procedures shall be in place to ensure that all staff and board members are familiar with and comply with the code. AmeriCorps members have the Code of Conduct included in their Member Service Agreement.
- Clear conflict of interest policy should be employed and reviewed and approved annually by the board. This should include a policy on nepotism.
- Procedures for determining reasonableness, allocability, and allowability of costs, in accordance with applicable cost principles and terms of the grant as defined by the IDHS-Serve Illinois. Procedures must be applied consistently across all programs.
- Record retention and destruction procedures shall be established to store, secure, and maintain records and to ensure that records can be obtained and presented for review during monitoring or audit.

Common Audit Findings

Program policies should be evaluated from the perspective of potential financial implications. With this in mind, IDHS-Serve Illinois shares these common areas of questioned costs and repayments in recent AmeriCorps audits. To prevent audit findings, strong AmeriCorps-specific policies and procedures in the following areas should be created, followed, and regularly reviewed/updated. These are the most common audit findings as identified by AmeriCorps Office of Inspector General:

- Member and staff timekeeping (lack of documentation, shortage of hours, supervisors with excessive hours, unsigned timesheets, costs claimed based on budget not actuals, costs claimed before or after member service agreement period, costs claimed before or after grant agreement period).
- Member end-term evaluations are not completed (if member serves any terms without an end evaluation of a prior year, all costs for subsequent terms are questioned).

- Program activities (member or staff training or travel lack supporting documentation, member activities are not included in the approved grant, member activities replace or displace paid staff).
- Program costs are excessive or not included in the approved budget/grant (failing to obtain a budget amendment for a planned change in their budget, costs are not relevant or necessary to the grant).
- Source documentation has not been retained and therefore is not available to support claimed costs.

Member Costs – Living Allowances and Other Costs

Living Allowance

Member payroll must be managed in accordance with AmeriCorps requirements. Living allowance must be paid in equal increments from the start of service through the end of service. Programs cannot issue lump sum payments to “make-up” payments for late starts or early exits. Generally, members in the same slot type cannot receive varying living allowance amounts, member living allowance cannot increase or decrease over term of service, members cannot be paid overtime, and member paid before or after their service agreement period using grant funds. Living allowance payments should align with the number of approved timesheets in the AmeriCorps timekeeping system, or approved alternative.

Each program is required to have a policy to address situations that may impact the payment of living allowance. In addition, programs should develop procedures for communicating member enrollments and exits in a timely fashion with the accounting/payroll staff. Note: member living allowance payments cannot be withheld as a penalty for members with zero-hour timesheets. Variances from these documents, including members without fully executed MSAs may result in federal disallowances.

Additional living allowance that aligns with the program’s plan to provide increased stipends for returning members or members in lead roles should be included in the appropriate slot type(s) budget. Additionally, funds for completion or retention bonuses should be included in the slot type(s) for which the bonuses are being offered. Any bonuses or lead role increase should be supported by program policy. See section 2.1 for additional information.

Garnishment

Because of sovereign immunity, the federal portion of AmeriCorps member living allowances is not subject to garnishment.

Unemployment

AmeriCorps members are not eligible for unemployment; therefore, unemployment taxes should not be applied to member payroll.

Healthcare

Member costs attributable to specific members should be paid with funds from the appropriate grant year. For example, MAP costs for a 23-24member should not be paid from 22-23 funds. However, rebates of healthcare costs are allowed by statute to be applied to healthcare costs in the year the rebate is received [2 CFR 200.447(e)].

Jury Duty

During the time AmeriCorps members serve as jurors, they should continue to receive credit for their normal service hours, a living allowance, healthcare coverage and, if applicable, childcare coverage regardless of any reimbursements for incidental expenses received from the court. Normal service hours are determined based on the Anticipated Service Schedule.

National Guard Active Duty

In instances where the dates of active duty are inflexible and conflict with AmeriCorps service, members should be granted a leave of absence for the two-week period of active-duty service in the Reserves. Grantees should continue to pay the living allowance and provide health care and childcare coverage for the two-week period of active duty. Grantees should credit members for normal AmeriCorps service hours (the number of hours he/she would have served) during their two weeks of active-duty service in the Reserves if it occurs during their AmeriCorps service. No AmeriCorps service credit is earned for the once-a-month weekend (inactive duty/Drill) service in the Reserves. Normal service hours are determined based on the Anticipated Service Schedule.

Administrative/Indirect Costs

Administrative or Indirect Cost are centralized expenses of the overall administration of an organization exclusive of particular project costs. Programs should charge the federal and grantee/match administrative share monthly based on claimed costs. Details about the program's administrative/indirect basis are found in the approved budget.

Federal administrative share should be included in the organization's ledger. Match administrative share should also be included in the organizational ledger; at a minimum, there must be a note to the ledger regarding the grantee share of administration.

Budget Monitoring, Changes and Amendments

Budgeting is not an annual process, but rather an ongoing review of actual and anticipated costs. This process allows for proactive action to be taken to address budget variances. The program management and financial personnel should work together to conduct periodic budget review.

Budget Management (Control Practices) (2 CFR 200.328)

Budget controls assure programs stay within the parameters of the approved budget. Example practices include:

- Regular monitoring (monthly or quarterly corresponding with submission of reimbursement requests to IDHS-Serve Illinois) of budget figures by comparing them to actual year-to-date and current period expenditures. Used to accurately determine the difference between projected revenues and expenditures (as captured in the grant budget) against actual funds spent and received to implement grant activities.
- Regular reconciliation of the organization's general ledger (financial records) to the claim reports to determine how budgeted expenses are actually expended.
- Monitoring to accurately project unexpended funds and adequately plan for their use (through approved budget amendments) to report them to IDHS-Serve Illinois (through the Unexpended Funds report).
- Review to ensure that budgeted match requirements are met. (Not applicable for fixed-amount programs.)

- Method to ensure that the administrative match remains within allowable rates. (Not applicable for fixed-cost programs.)
- Identification of the cause of discrepancies between projected and actual figures. Process for recording and explaining budget variations that are unexpected or unusual and determining necessary adjustments, including the attribution of cost changes to specific program circumstances or timing of activities.
- Ability to accurately track, expend and report program income as required by federal regulations. (For Fixed Amount programs, the ability to verify whether program income exceeds project costs and, if so, to report this information to IDHS-Serve Illinois.)
- Ability to obtain approvals, track, and report other federal funds used as match to the AmeriCorps grant.
- Process for requesting prior approvals for budgetary modifications when necessary. (Not applicable for Fixed-Amount programs.)

The ultimate goal of budget monitoring is to effectively utilize, track and report program financials; leading to preparation of more accurate budgets in the future.

Budget Changes (2 CFR § 200.308)

At times budgetary changes may be needed. Some changes require approval at the state level, while others may require federal approval. Programs should keep IDHS-Serve Illinois informed about deviations in the approved budget that may impact the grant and contact their program officer for guidance on how to handle any budget modifications or amendments.

Requests for budget changes should be submitted to your Program Officer. If an AmeriCorps amendment is required, IDHS-Serve Illinois will facilitate the required approvals with AmeriCorps. The program officer will notify the program when the request is approved; and a grant agreement amendment will be issued as appropriate.

Requests for extensions and/or amendments will be reviewed by IDHS-Serve Illinois and will be determined on a case-by-case basis. Budget amendments must never be requested to “spend down” federal resources; but should be based only on actual program needs as planned for in the approved grant application. IDHS-Serve Illinois has an established deadline for no cost extensions to allow members to complete their terms of service. The no-cost extension may be rescinded, and a new end date established if the member term(s) that required the extension exits their service prior to the planned end date. Programs should not implement any changes until they receive written approval from IDHS-Serve Illinois and/or AmeriCorps.

Budget Amendments

The following items require IDHS-Serve Illinois approval (regardless of whether the expense is on the federal or match side). Changes listed below also require AmeriCorps approval, which will be handled through your IDHS-Serve Illinois program officer. A request should be sent to DHS.ILAmeriCorpsPO@illinois.gov. In the case of any budget amendment, the program will be expected to meet the budgeted matching share noted in their approved budget.

- Items Not Included in Budget
- Items not described or accounted for within the budget require approval from IDHS-Serve Illinois. (For example, if the program did not budget for purchase of supplies in excess of

\$1000, e.g., a laptop, but determines a need for such an item and wants to purchase it using AmeriCorps funds or match.)

- Budgetary changes related to changes in the scope or goals of the project.
- Transfer from Indirect to Direct Costs. The transfer of amounts budgeted for indirect costs to absorb increases in direct costs, or vice versa.

Costs Requiring Prior Approval

The inclusion of costs that require prior approval according to relevant Uniform Guidance (overtime pay, alteration, *pre-award costs).

- Sub-grants or contracts not included in approved application and budget;
- Equipment with a value of \$5,000 or greater;
- Supplies costing \$1000 or more; and
- Adding a cost in a line item that was not included in the approved budget.
- Changes amounting to 10% or more of the total budget require AmeriCorps approval; however, it is a best practice to keep IDHS-Serve Illinois aware of any significant budget variances.

*Note: Pre-award costs may only be charged to the first budget period (2 CFR § 200.458)

To make determination of approval, IDHS-Serve Illinois will consider:

- Whether the item is included specifically in the grant,
- Whether the cost is necessary, reasonable, and allocable to AmeriCorps,
- Whether the program is maintaining the cost/MSY that was approved, and
- In the case of equipment, whether the bid is acceptable based on equipment specifications, availability, and other reasonable considerations.

Match/Grantee Share (45 CFR 2521.40)

Cost reimbursement programs are required to meet an overall matching rate that increases over time (statutory match). Illinois cost reimbursement grant programs are expected to meet the matching requirements as outlined in the program's approved budget (budgetary match). There is no match requirement for fixed amount grant programs, including Education Award Only and Fixed Amount Grants.

Programs applying federal share and match to a single cost should document how they are attributing the costs based on the plan used to develop the grant budget. This is a different concept than 'allocation' which is the method used to distribute shared costs. The term 'attribution' describes how you distribute AmeriCorps-only costs to federal or grantee share.

The program should have documentation in their financial records that show which costs are attributed to federal share and which costs are attributed to match share. During financial desk monitoring, IPERIA, and other financial monitoring, these percentages should be shared as supporting documentation for how the costs were applied to the grant. The documentation should indicate:

- The priority of funding (for example, all program income should be expended before federal funds are requested)
- The timing of various attribution patterns (for example,)

- The attribution percentage. (For example, if a program budget shows 62% of living allowance costs to the federal share and 38% of living allowance costs to the grantee share, this percentage could be applied consistently to all living allowance costs.)
- If not using an allocation percentage, a description of the method that is being used. (For example: the program is attributing all costs for X list of members to federal share and all costs for Y list of members to grantee share.)

The acceptable sources of matching funds are state, local, private, and/or other federal funds in accordance with applicable AmeriCorps requirements. In-kind match is also acceptable under the AmeriCorps grant and the documentation standards are the same as those for cash match.

AmeriCorps legislation permits the use of non-AmeriCorps federal funds as match. Program must ensure activities meet the requirements and purpose of both grants and have verification from the other federal agency of the ability to use their funds as match to the AmeriCorps grant.

At the time of publication of this manual, we are aware of written authorization from the following federal agencies which details the terms under which their funds can be used as match.

- Department of the Interior (conservation corps and similar programs)
- Administration On Aging (use of Title III E funds to support similar activities)
- Department of Education
- Department of Health and Human Services
 - Office of Refugee Resettlement
 - Community Services Block Grant Program-CSBG
 - ACF Child Welfare Grants
 - Temporary Assistance for Needy Families-TANF

The program is responsible for confirming the source of match from sites or financial contributors to ensure allowability.

Documentation

All AmeriCorps federal and grantee share of costs (including in-kind contributions) shall be supported with properly authorized source documentation such as time and attendance reports, canceled checks, invoices, paid bills, travel documentation, or contracts. Records shall be maintained which adequately identify the source and application of funds (federal share or grantee share) for grant supported activities. Records shall be maintained that trace funds to a level of expenditure adequate to establish that funds have not been used to violate the restriction imposed by the grant. Further, financial information shall be maintained to show the relation of expenditures or matching resources to grant-related performance or productivity. IDHS-Serve Illinois requires that the program certify, in writing, that matching funds for these costs are from non-federal or approved federal sources on an annual basis.

Cost Allocation Policy (2 CFR § 200.416)

Cost allocation is a method to distribute cost based on benefit to the Illinois AmeriCorps Program and may be used to charge the cost to more than one program or grant. Information about developing a cost allocation policy, including a template policy and cost allocation plan is available from IDHS-Serve Illinois Please talk with your program officer if you would like these resources. Please see section 2.1 for more information on Cost Allocation Policy.

Some examples of cost allocation:

- Organization's rent may be allocated to programs based on the square footage used by the staff of each program. However, this method does not account for any shared space – such as hallways, meeting rooms, restrooms, etc. Therefore, it may be preferable to allocate the overall square footage based on the number of FTE based in the office and working on each program. Either of these methods could be considered reasonable if used consistently.
- Office internet costs allocated using the number of full-time employee (FTE) equivalents working on each program.

Grant Closeout

Programs completing the final year of their three-year grant cycle must submit two (2) inventory forms. These are due March 1 following the end of the three-year grant cycle. One form is for any equipment inventory having a current fair market value of \$5,000 or more and purchased with federal grant funds. The second form is for any unused or residual supplies inventory purchased with federal funds exceeding \$5,000 in value. These reports should be completed on the Equipment and Supply Inventory Form posted to Basecamp. If no equipment or supplies were purchased using federal funds, programs should reflect this on each form.

In addition, a closeout packet is due to IDHS-Serve Illinois sixty (60) days following the end of the grant agreement period. The closeout packet has program and financial components, so please view the Financial Management section (section 4) for more information on the financial aspects of closeout. Grantees will be asked to certify and/or provide verification that the following programmatic activities have been completed:

- All members were enrolled in the correct term in eGrants.
- All members were assigned to a service site in eGrants.
- All members are exited in the eGrants/My AmeriCorps Portal.
- The appropriate forms were submitted and approved in for all members that were:
 - Exited early for cause, including members that served their entire term, but didn't complete the minimum hours;
 - Exited early, successfully; or
 - Exited for compelling circumstances (CPC).
- All members that were suspended during the grant year have the appropriate form to bring them out of suspension prior to continuing service or exiting.
- Any amendments to the Member Service Agreement and the Member Position Description have been completed.
- Ensure that all hours were completed after the start date and before the end date of the term.
- All start and end dates of member terms align with start and end dates in eGrants
- Any members having an extension to their term of service have an MSA amendment and an approval form from IDHS-Serve Illinois.
- All exited members have a completed End of Term evaluation on file.
- Final progress report has been completed and submitted.
- All compliance and site visit issues are resolved.

In addition, the program will need to submit Residual Inventory and Equipment forms required by AmeriCorps and available on Basecamp.

Problems/Issues, Including Legal Issues

Notify IDHS-Serve Illinois immediately if any of the following instances occur and inform IDHS-Serve Illinois about the corrective action taken:

- Legal issues, such as lawsuits against the organization, its authorized representative, or board of directors,
- Instances of fraud, theft or misuse of federal funds related to the AmeriCorps grant or staff on the AmeriCorps grant,
- Any developments or delays that have a significant impact on funded activities,
- Any significant problems relating to the administrative or financial aspects of the grant,
- Any suspected misconduct or malfeasance related to the grant or program,
- Losses of federal funds or goods/services supported with federal funds, or
- When information discovered by someone at the program indicates that there has been waste, fraud or abuse, or any violation of criminal law, at the program or at a sub-recipient.

Refer to the Terms and Conditions for additional information on reporting of issues. Notification is required in some cases related to alleged member criminal or drug activity. Those notifications are covered in the Member Management section of this manual.

Request for Extension to Established Due Dates

Extensions must be requested via email and sent to: DHS.ILAmeriCorpsPO@illinois.gov from the Illinois AmeriCorps program for consideration. Extensions will be determined and reviewed by IDHS-Serve Illinois leadership on a case-by-case basis. IDHS-Serve Illinois may withhold payments or take other actions as outlined in the Grant Agreement if program or financial reports are late, inaccurate or out-of-compliance (i.e., matching requirements not met).

PART SEVEN

Monitoring

Pre-Qualification and Risk Based Assessment

The Pre-Qualification stage is completed prior to submitting an application for a grant or other awards. The time to process all registrations can take up to 12 weeks. You won't be able to complete the entire process in one day, as some steps are contingent upon others, but you can come back to this guide as often as you need. The link below will give full details on the steps required for this process.

[Grant Applicant Pre-Qualification and Pre-Award Requirements \(state.il.us\)](https://www.state.il.us)

Programmatic Monitoring

Purpose of Programmatic Monitoring

As stewards of public funding IDHS-Serve Illinois needs to ensure the programs they fund are aware of their contractual requirements and are in compliance with all of the rules, regulations, and provisions governing AmeriCorps funds. To accomplish this, the Program Officer must create adequate systems for monitoring programs.

First year programs will receive a site visit by their Program Officer during to the start of their first grant cycle. In addition, first year programs will be considered high risk and will also have a monitoring review scheduled during their first year.

Programs with staff changes, i.e., Program Director, will also be considered high risk and will have a monitoring review scheduled during the first year with the new staff.

Other factors that may determine if your program is at high risk, include, but are not limited to, late reporting, not participating in mandatory calls, trainings, and serious issues that arise during the Program Year, etc.

This approach helps to ensure high quality AmeriCorps programs are implemented while maximizing staff time and meeting the recommendations of the Inspector General in regard to program monitoring.

Monitoring Visits

Based on a state or organization's risk-based monitoring strategy, a programmatic site visit may be made to every awardee or site one time per grant cycle, one time per year, or more often as may be appropriate. It is the goal of IDHS-Serve Illinois to complete monitoring visits to each program every year; however, this depends on staffing levels.

In most cases, on-site monitoring visits will be scheduled at least 30 days in advance. Your Program Officer will contact you to schedule the monitoring visit for your program.

Preparation

To prepare properly for an on-site monitoring visit, your program staff should:

- Make certain appropriate staff will be available.
- Send all documents electronically ahead of time per the instructions you will receive.
- Understand that Program Directors are not included in the Member interviews.
- Review the Documentation request provided by your Program Officer and be prepared to send the requested documentation electronically.
- Make certain all required forms are in the Member files and in the order listed on the Member File Checklist.

- Verify that Member time sheets are up to date and signed/dated by the Member and their immediate supervisor (from their host site).

Typical on-site activities during the Monitoring Review include but not limited to the following:

1. Discussion with Program staff;
2. Member File documentation compliance check;
3. Financial compliance check;
4. Policy & Procedures compliance check;
5. Host site visit; and
6. Member interviews.

ACTIVITY	INDIVIDUALS INVOLVED
Discussion	Program Director & Staff
Member File Compliance Check	Program Director and/or Staff
Financial Compliance Check	Program Director & CFO
Policy & Procedures Compliance Check	Program Director
Host-Site Visit	Program Director & AmeriCorps Members
Member Interviews	AmeriCorps Members

The purpose of an on-site monitoring visit is to assess the program’s compliance with federal regulations and to help the program improve systems to pass an OIG audit. Member files, program policies and fiscal records will be reviewed during the visit. The Serve Illinois AmeriCorps Program Review Instrument will be used to assess program compliance.

On-Site visits by program staff can have many purposes, some of the most important are summarized in the table below:

LEARNING	Finding out about AmeriCorps awardees’/sites’ service activities and community partnerships.
PUBLICITY	Hearing success stories.
COMPLIANCE	Assuring that all federal, state, local, contractual, and organization-specific regulations, policies, and provisions are being followed.
MONITORING PROGRESS	Comparing actual outputs and outcomes to the performance measures outlined in an awardee/site contract.
TECHNICAL ASSISTANCE	To improve overall quality of the program.

During the on-site monitoring visit, your Program Officer will use the following modules of the Serve Illinois AmeriCorps Program Review Instrument:

Module A: Reporting and Communication Compliance and Early Issue Detection

Portions of this Module will be completed by your Program Officer prior to the monitoring visit using information provided in eGrants. Results will be reviewed with the program and important issues, or concerns will be discussed. Programs that are not performing in this area must show improvement and demonstrate a commitment to improving. Any concerns in this area will be addressed in the site visit feedback letter and a corrective action plan to improve future performance will be required.

Module B: Financial Compliance

The majority of this module will be completed with the assistance of the program's fiscal staff, but some questions will most likely be answered by program staff. Programs should have copies of their expenditure forms and the Federal Financial Reports submitted via eGrants available for review. A copy of the program's final approved budget should also be available. In general, a program must have all required documentation for each item on the list.

Module C: Policies and Procedures Compliance

All programs must be in compliance with all of the policies and procedures listed in Module C. Documentation and/or proof of compliance is necessary in case of an audit. Programs must have all documentation listed for this compliance check readily accessible to your Program Officer during the monitoring review.

Module D: Member Documentation Compliance

Your Program Officer is required to review ten percent (10%) or ten (10) Member Files, whichever is greater. If your program has 40 Members, 10 Member Files are required to be reviewed. If your program has 300 Members, 30 Member Files are required to be reviewed. Member files are reviewed to determine if required documentation is being kept by the program. Proof of compliance is necessary in case of an audit. Your Program Officer will randomly select the Member files to be reviewed. All Member files reviewed must contain the required documentation and be placed in order in the Member file as listed on the MODULE D: Member Documentation Compliance form. In addition, each Member file must have the Member File Coversheet along with the completed documents attached to it.

Module D2: Staff or Site Supervisor Compliance

Your Program Officer is required to review all Staff listed under Section 1 of the application. Staff files reviewed must contain the required documentation and be placed in order in the Staff file as listed in MODULE D2.

Module E: Host Site Visit

You and the monitoring team will visit one or more sites where Members are serving.

Module F: Member Interviews

The monitoring team will interview a group of Members during the visit. Program staff will not be involved in this interview, and responses will be kept confidential. A summary of the discussion will be made available with the rest of the monitoring report.

**See Attachments –*

Program Review Instrument – Monitoring Tool Member Service Agreement (MSA)

Member File Coversheet

Review Outcome

An AmeriCorps Program Review will be sent to the Program Director and/or designee by your Program Officer which may request additional documents. Programs will have 10 working days to respond with the requested documentation showing full compliance. Once the review is completed, the Program Officer will notify the Program Director and/or designee in writing that the monitoring review has been completed and all issues have been resolved. Copies of all completed forms and correspondence sent to the SIC Program Officer will be kept in the program file.

Programs that are not performing must show improvement and demonstrate a commitment to improving. Any concerns in this area will be addressed in the Program Review and a corrective action plan to improve future performance will be required.

High Risk Programs

Programs designated as high risk or who request a site visit to focus on specific issues may receive additional visits. High risk factors may include, but are not limited to:

- A first-year program
- A change in program director or other key staff
- Legitimate Member complaints to the Commission
- Poor past performance by the program (based on progress reports and/or previous site visits)
- Concerns regarding prohibited activities
- Compliance with reporting deadlines and Financial Compliance Issues

These visits will be conducted on an on-going basis throughout the program year. High Risk on-site visits may not be scheduled 30 days in advance. These visits will occur when issues are brought to the attention of the Program Officer. Commission staff will determine the need for a High-risk on-site visit.

High Risk Site Visits

High risk on-site visits are conducted to provide targeted assistance on specific issues or concerns.

First year programs will receive an on-site visit by their Program Officer and/or SIC Staff prior to the start of their first grant cycle. In addition, first year programs will be considered high risk and will also have a monitoring review scheduled during their first year.

Programs with key staff changes will also be considered high risk and will have an on-site monitoring review scheduled during the first year with the new staff.

Other factors that may determine if your program is at high risk, include, but are not limited to, late reporting, not participating in mandatory calls, trainings, serious issues that arise during the program year, etc.

For program-related visits being conducted because of high risk factors, the agenda will be determined by the reason for the visit. For example, the agenda for a visit that is being held because of a change in program director will focus on expectations of programs, AmeriCorps regulations and relationship building. The agenda for a visit that is being conducted because of concerns regarding prohibited activities will focus on meeting with Members, site supervisors, and program staff to assess whether prohibited activities were taking place and to ensure that prohibited activities do not occur in the future.

A Program Review will be completed for each High-Risk On-Site Visit.

PART EIGHT

Helpful Resources

Key Terms and Definitions

Following are the definitions for some key terms that you should become familiar with and appear in this manual. In addition, please see Part Nine Other Helpful Resources for additional terms and definitions.

AmeriCorps or General Grant Related Terms	
AmeriCorps the agency (formerly CNCS)	Originally established as the Corporation for National and Community Service (CNCS), AmeriCorps, the agency, funds AmeriCorps State and National, AmeriCorps VISTA, and AmeriCorps Seniors projects. AmeriCorps was authorized by the signing of the National and Community Service Trust Act of 1993. The agency is still formally recognized as CNCS doing business as (dba) AmeriCorps.
AmeriCorps member	A service member who is completing the term of service for the AmeriCorps program. They are referred to as members and not volunteers or workers to enforce the service aspect of the program.
AmeriCorps NCCC	AmeriCorps National Civilian Community Corps (NCCC pronounced 'N triple C') is a full-time, team-based residential service program for 18–26-year-olds. Members serving in the NCCC program are assigned to one of four regional campuses and then placed into teams ranging between 8-12 members. The teams complete a variety of service projects, which are generally 3 to 13 weeks in duration, and respond to local communities' needs throughout the United States and territories.
AmeriCorps Seniors	AmeriCorps Seniors engages volunteers aged 55 and older to serve their communities in programs including, the Foster Grandparent Program (FGP), the Senior Companion Program (SCP), and the Retired and Senior Volunteer Program (RSVP).
AmeriCorps State and National	Members participate in local service programs operated by not-for-profits, local and state government entities, Native Nations, territories, and institutions of higher education, local school and police districts, and partnerships among any of the above.
AmeriCorps VISTA	Members of AmeriCorps VISTA (Volunteers in Service to America) serve annually to alleviate poverty by helping local organizations expand capacity to make change.
ALN (Assistance Listing Number)	Assistance Listing Numbers (ALN), formerly known as Catalog of Federal Domestic Assistance (CFDA), are related to Federal programs, projects, services, and activities that provide assistance or benefits to the American public.
CFDA (Catalog of Federal	The CFDA was a Government-wide compendium of Federal programs, projects, services, and activities that provide assistance or benefits to a variety of recipients. The CFDA summarizes financial and nonfinancial assistance

Domestic Assistance)	programs administered by departments and agencies of the Federal Government.
CFDA number	The number assigned to a Federal program in the CFDA
CFR (Code of Federal Regulations)	The Code of Federal Regulations (CFR) is a codification of the general and permanent rules published in the Federal Register by the executive departments and agencies of the Federal Government. It presents the official and complete text of agency regulations in an organized fashion in a single publication.
CFDA Program title	The title of the program under which the Federal award was funded in the CFDA.
Closeout	The process by which the Federal awarding agency or pass-through entity determines that all applicable administrative actions and all required work of the Federal award have been completed and takes actions as described in § 200.343 Closeout of the OMB Uniform Grants Guidance.
Continuation Grant	An extension or renewal of existing program funding for one or more additional budget period(s) that would otherwise expire. Continuation grants are typically available to existing recipients of discretionary, multi-year projects; however, new applicants may be considered. Receipt of a continuation grant is usually based on availability of funds, project performance, and compliance with progress and financial reporting requirements. Applications for continuation may compete with other continuation requests submitted to the awarding agency.
Cost sharing or matching	The portion of project costs not paid by Federal funds (unless otherwise authorized by Federal statute). See also §200.306 Cost sharing or matching of the OMB Uniform Grant Guidance.
Competitive Grants	Programmatic grants that support AmeriCorps programs which involve members in defined service projects to meet identified community needs. All organizations that submit applications to ASN competitive NOFOs compete against each other for funding. That means that all State Commission competitive sub applications and all direct applications sub applications compete against each other for the same pool of funding. External reviewers review the applications against criteria published in the NOFO. Currently, all ASN's competitive grants are programmatic.
eGrants	AmeriCorps' online grant application and management system.
FFR (Federal Financial Report)	A consolidated federal cash and federal expenditure report submitted in eGrants that details the status of AmeriCorps and Grantee funds within a specific timeframe

(required by AmeriCorps)	
FOIA (Freedom of Information Act)	The Freedom of Information Act, or “FOIA,” is the federal government’s promise that public records made in the conduct of public business are public. It requires that any federal agency fully or partially disclose information and documents controlled by the United States government upon request.
FY (Fiscal Year)	Like all Federal agencies, the fiscal year begins October 1 and ends on September 30 of the following year. For the State of Illinois, the State fiscal year begins on July 1 and ends on June 30 of the following year.
Grant Assurances and Certifications	The Assurances and Certification section provides a means for institutions to indicate (or view the indication of) compliance with particular laws, policies, and/or regulations as well as to indicate that it meets certain research requirements.
Formula Grants	Awarded to states based on a population formula each year. Each state commission manages a Formula grant competition and conducts a state grant review process to determine the Formula grant subrecipients.
Grant Agreement	<p>A legal instrument of financial assistance between a Federal awarding agency or pass-through entity and a non-Federal entity that, consistent with 31 U.S.C. 6302, 6304:</p> <ol style="list-style-type: none"> 1. Is used to enter into a relationship the principal purpose of which is to transfer anything of value from the Federal awarding agency or pass-through entity to the non-Federal entity to carry out a public purpose authorized by a law of the United States (see 31 U.S.C. 6101(3)); and not to acquire property or services for the Federal awarding agency or pass-through entity's direct benefit or use. 2. Is distinguished from a cooperative agreement in that it does not provide for substantial involvement between the Federal awarding agency or pass-through entity and the non-Federal entity in carrying out the activity contemplated by the Federal award. 3. Does not include an agreement that provides only: (1) Direct United States Government cash assistance to an individual; (2) A subsidy; (3) A loan; (4) A loan guarantee; or (5) Insurance.
MSY (Member Service Year)	One MSY is equivalent to one full time member (1700 hours). AmeriCorps funds are contingent on the number of MSYs requested by the program. There are 6 types of AmeriCorps member terms or slots: full time (1700), reduced full time (1200), half time (900), reduced half time (675), quarter time (450), minimum time (300) and abbreviated time (100). The total MSYs a program requests depends on the number and type of slots/members positions included in a particular program design.

Member or AmeriCorps member	An individual serving in an AmeriCorps program who is eligible to receive a Segal Education Award.
NCSA (National and Community Service Trust Act of 1990, as amended by the Serve America Act)	The Act passed by Congress and signed into law in 1990 to establish the Commission on National and Community Service, now called AmeriCorps. In 2009, it was reauthorized and amended into the Serve America Act.
National Direct	An AmeriCorps State and National prime grantee that provides multi-state AmeriCorps programming.
National Service	In the context of IDHS-Serve Illinois, it is participation in one or more programs managed by AmeriCorps, i.e., AmeriCorps VISTA, NCCC, State and National, or AmeriCorps Seniors.
NOFO (Notice of Funding Opportunity)	A federal publication that informs the public that funding is available for a specific purpose and can be requested through an application process. AmeriCorps State and National releases several NOFOs each year for opportunities including but not limited to, AmeriCorps State and National Competitive funding, Native Nations funding, Public Health AmeriCorps funding, and AmeriCorps State and National Planning Grant funding.
OMB (Office of Management and Budget)	Assists the President in preparing the annual federal budget and oversees its execution. OMB must approve AmeriCorps regulations, applications, forms, and any other documents that affect the public.
ORO (Office of Regional Operations)	Established in 2019 through AmeriCorps' Transformation and Sustainability Plan, ORO is the primary workforce administering more than 2,000 national service grants and projects for AmeriCorps State and National, AmeriCorps Seniors (Foster Grandparent Program, Senior Companion Program, and RSVP), AmeriCorps VISTA, and Days of Service Programs. ORO implements the agency's priorities and grant making activities within the unique context of each of the eight regions by integrating and operationalizing policies and priorities within the Office of the Chief of Program Operations.
Pass Through Entity	Pass-through entity means a non-Federal entity that provides a subaward to a subrecipient to carry out part of a Federal program.
Prime Grantee	A direct recipient of a grant from AmeriCorps; prime grantees include state commissions, national/multi-state programs, and Native Nations programs.
Program Director	This refers to the person with primary responsibility for implementation of the AmeriCorps program. They are the main contact for the program.

PPR (Project Progress Report) (AmeriCorps requirement)	Report submitted in eGrants that details progress toward achievement of approved performance targets within a specific timeframe. PPRs are collected annually and at the end of a grant.
Public Health AmeriCorps	An AmeriCorps State and National program established by a partnership between AmeriCorps and the Centers for Disease Control and Prevention with the goal of supporting the recruitment, training, and development of the next generation of public health leaders who will be ready to respond to the nation’s public health needs.
Prohibited Activities	A specific set of mandated activities that while charging time to the AmeriCorps program, accumulating service or training hours, or otherwise performing activities supported by the AmeriCorps program, staff and members may not engage.
Recipient	A non-Federal entity that receives a Federal award directly from a Federal awarding agency to carry out an activity under a Federal program. The term recipient does not include subrecipients. See also § 200.69 Non-Federal entity in the OMB Uniform Grants Guidance.
RFP (Request for Proposal)	A solicitation by a government entity or agency for products or services from public contractors. By law, government agencies are required to issue bids publicly whenever they need a specific product or service.
Service	IDHS-Serve Illinois refers to “service” in this document when referencing AmeriCorps members’ duties. AmeriCorps members “serve”, they do not work or volunteer at their site. Service is considered the action of helping others in a structured program. AmeriCorps members may receive a living stipend in exchange for their service, but it is not considered a wage or based on the number of hours they serve.
Service Site	The partner organization hosting AmeriCorps members. A partner organization must have legal status as a state or local government, an Indian Tribe, a non-profit organization (religious organizations are permissible), or an educational institution and provide one or more types of eligible programs as defined in C.F.R. §2522.110.
State Service Commission	An independent, bipartisan commission appointed by a governor to implement service programs in their state or U.S. Territory. Each state commission receives AmeriCorps formula funding, is eligible for AmeriCorps competitive funding, and is responsible for managing AmeriCorps subgrantees within their state or territory.
Subaward	A legal instrument to provide support for the performance of any portion of the substantive project or program for which IDHS-Serve Illinois received this award and that IDHS-Serve Illinois awards to an eligible subrecipient. The term does not include IDHS-Serve Illinois’ procurement of property and services needed to

	carry out the project or program (for further explanation, see 2 CFR § 200.330.) A subaward may be provided through any legal agreement, including an agreement that IDHS-Serve Illinois considers a contract.
Subgrantee or subrecipient	An entity that receives a subaward from IDHS-Serve Illinois under an AmeriCorps award; and is accountable to IDHS-Serve Illinois for the use of the Federal funds provided by the subaward.
SAM (System for Award Management)	SAM validates applicant information and electronically shares the secure and encrypted data with the federal agencies' finance offices to facilitate paperless payments through Electronic Funds Transfer (EFT).
Terms and Conditions	Legally binding requirements for grant awards from Federal agencies.
Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards (also known as Uniform Guidance or 2 C.F.R. 200)	Uniform Guidance is a government-wide framework for grants management and provides an authoritative set of rules and requirements for federal awards. It is the foundation on which federal agencies develop their policies for grants and cooperative agreements.
UEI (Unique Entity Identifier)	A non-federal entity is required to have a UEI in order to apply for, receive, and report on a federal award.
Illinois Specific Terms	
ARRMS (Audit Report Review Management System)	Centralizes the audit report review of grantee and subrecipient audit reports and helps to ensure that audits are conducted and reviewed in accordance with auditing standards, allowing state agencies to place greater reliance on the audit results as part of the overall monitoring process.
CFSA (Catalog of State Financial Assistance)	The single, authoritative, statewide, comprehensive source document of State financial assistance program information. IDHS-Serve Illinois must post AmeriCorps assistance/funding opportunities to the CFSA.
CAAF (Contract/Agree)	The CAAF authorizes approval for the obligation of funds for a Contract/Agreement.

ment Approval Form)	
CSA (Community Service Agreement Tracking System)	A system used by IDHS grantees to enter and submit budgets, view and print Uniform Grant Agreements, and enter IDHS Year-end CFR information
CYEFR (Consolidated Year	The Consolidated Year End Financial Report (CYEFR) is a standardized cost reporting template. The use of this template to collect year end costs from IDHS grantees
FFR (Federal Financial Reporting)	Federal Financial Report. Twice per year, IDHS-Serve Illinois submits a FFR to the AC HQ to note the amount of federal funding used, federal funds used as match, and program income. EDCFs are compiled in order to collect data to submit the federal government on behalf of programs.
“Good Standing” with the SOS	A rating of ‘good standing’ in the SOS business database means that the organization has complied with all of the state’s requirements for reporting and paying fees.
(GATA) Government Accountability and Transparency Act	Landmark Illinois legislation that increased accountability and transparency in the use of grant funds while reducing the administrative burden on both State agencies and grantees through adoption of the federal grant guidance and regulations codified at 2 CFR Part 200 (Uniform Requirements).
GATU (Government Accountability and Transparency Unit)	The Illinois agency established within the GOMB and charged with implementation of the GATA in coordination with State agencies and grantees.
(GOMB) Government Office of Management and Budget	The Governor's Office of Management and Budget prepares the Governor's annual state budget and advises the Governor on the availability of revenues and the allocation of those resources to agency programs. The Office also issues general obligations and Build Illinois bonds, manages the state's capital program, analyzes state agency programs and budgets and evaluates personnel and operating needs. The major areas of review are education, health and social services, public assistance, debt management, public safety and the environment.

(IDHS) Illinois Department of Human Services	The Illinois state agency that hosts the IDHS-Serve Illinois Commission
IDHS FCS Division of Family and Community Services	The division within the IDHS that hosts the IDHS-Serve Illinois Commission
IDHS-Serve Illinois Staff	IDHS-Serve Illinois currently has twenty-one full-time staff members who are listed in the previous section. Subgrantees of IDHS-Serve Illinois may work with all staff at times but will primarily interact with the AmeriCorps Program Officer, Program Specialists, Program Manager and Bureau Chief as their main contacts to the Commission.
(ICQ) Internal Control Questionnaire	Entities applying for funds through a State issued NOFO must complete an Internal Control Questionnaire which is a fiscal and administrative risk assessment that is automated based on responses to the ICQ.
OCA (Office of Contract Administration)	Has direct oversight of all IDHS contractual functions and is responsible for communications with IDHS-Serve Illinois related to contract processing and procedures.
PACAP (Public Assistance Cost Allocation Plan)	IDHS, as a public assistance agency, prepares and maintains a PACAP and allocates administrative costs accordingly as required by the Code of Federal Regulations (CFR) under the Office of Management and Budget (OMB) grant guidance under 2 CFR Part 200, “Uniform administrative Requirements, Cost Principles and Audit Requirements for Federal Awards” (referred to as the Uniform Guidance). The Uniform Guidance requires all administrative costs of public assistance agencies like IDHS that are to be charged to federal awards to be done so by implementing a PACAP.
PPR (Periodic Performance Report)	A standard, uniform statewide performance progress reporting format used by all state agencies to collect performance information from recipients of state grant awards.
State Cognizant Agency	The State awarding agency designated to carry out the responsibilities described in 2 CFR §§ 200.513 (Responsibilities), 200.206 (State awarding agency review of risk posed by applicants), 200.208 (specific conditions for the fiscal and administrative risk assessment) and 200.214 (suspension and debarment), and appendices III through VII and IX to part 200, and GATA Section 25(6) (recipient/subrecipient prequalification requirements). The State of Illinois uses these State cognizant agencies as the State cognizant agencies for audit, indirect cost, prequalification, and fiscal and administrative risk assessment. Grantees are informed of their SCA through the Grantee Portal. SCA

	assignments are also documented for State agency personnel on the GATA implementation website.
State Service Commission	This is the state entity that distributes and manages AmeriCorps State funding and programs. Commissions are overseen by AC HQ and are required if a state is to receive AmeriCorps State funding. A commission refers to both the staff who work at the commission and the governing body oversees the staff and funding approval process.
EDF or EDCF (Expenditure Documentation and Certification Form)	Expenditure Documentation and Certification Form – the monthly form that AmeriCorps grantees submit to request payment under their award
Subgrantee or subrecipient	Illinois AmeriCorps State programs are considered subgrantees or subrecipients of IDHS-Serve Illinois. The terms subaward or subrecipient may be used interchangeably in this manual.
PFR/EDCF	Periodic Financial Report. This is a standard, uniform statewide financial reporting format used by all state agencies to collect financial information from recipients of state grant awards. Unless statutorily exempt as documented in the Catalog of State Financial Assistance and the Uniform Grant Agreement (UGA), all grant awards are subject to periodic financial reporting.
PRA (Programmatic Risk Assessment)	A crucial process in grant management that involves identifying potential risks, analyzing and evaluating these risks, and assessing their impact on the agency and programming.
SOS (Secretary of State)	Regarding grantmaking, the SOS business database is checked during the prequalification portion of an application to determine if an applicant/grantee is in “good standing” with the SOS office.
UGA (Uniform Grant Agreement)	The Uniform Grant Agreement (UGA) provides State of Illinois (State) grantmaking agencies subject to GATA with a uniform template for grant agreements that complies with the Grant Accountability and Transparency Act (GATA). State grantmaking agencies have used a uniform template for grant agreements since state fiscal year 2017. Likewise, the Uniform Grant Amendment provides State agencies with a uniform template for amending grant agreements to continue compliance with GATA. The UGA and the Uniform Grant Amendment are designed to comply with 2 CFR Part 200, federal Uniform Guidance, and the GATA statute, 30 ILCS 708.
Volunteer	An individual who gives of their time without monetary compensation for a community organization or cause. This person may or may not be in a

	structured program, but they do not receive a living stipend and are not under contract.
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