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Corporation for National and Community Service

NationalService.gov



February 21, 2017

Via email

Re: Freedom of Information Act Request # 2017-23

This letter is a response to the Freedom of Information Act (FOIA) request that the Corporation for National and Community Service (CNCS) received from you on February 21, 2017. You asked for “a digital/electronic copy of the VISTA Desk Reference, which is posted on the CNS [sic] internal employees-only intranet site.”

Your request is granted in full; I have attached a copy of the VISTA Desk Reference that was updated most recently on October 14, 2016. Nothing has been withheld from the record, and there is no fee for this response.

If you have any questions, please feel free to contact me at (202) 606-6747. You may also contact CNCS’s FOIA Public Liaison, Tom Bryant, at (202) 606-6678 or by email at tbryant@cns.gov.

Sincerely,

A handwritten signature in blue ink, appearing to read "Stephanie A. Soper".

Stephanie A. Soper
FOIA Officer

Enclosures: VISTA Desk Reference (10/14/2016)



VISTA DESK REFERENCE

Version 2.0

Updated 10/3/2016

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Chapter 1:

Introduction to the VISTA Desk Reference

Chapter Owners: VISTA Management

Effective Date: October 15, 2016

Reviewed: September, 2016

Overview of the VISTA Desk Reference

The VISTA Desk Reference aids CNCS State Office (CSO) staff as they administer the VISTA program. It is a repository of information on the program's mission, legal framework, funding, and policies. It also contains tips, checklists, and sample documents for administering the VISTA program.

The Desk Reference serves as:

- A compendium for policies and procedures
- A training and orientation manual for new staff
- A reference tool for staff as they implement the VISTA program

The Desk Reference is not meant for project sponsors or VISTAs. Both groups have documents that are targeted to their needs: VISTA Supervisor's Manual

(<https://www.vistacampus.gov/lessons/vista-supervisors-manual?id=2223>), VISTA Member Handbook (<https://www.vistacampus.gov/lessons/vista-member-handbook?id=2093>), and VISTA Manual Para Los Miembros (<https://www.vistacampus.gov/lessons/vista-member-handbook-en-espanol?id=2094>).

How to Use the Desk Reference

The VISTA Desk Reference, also known as the VDR, is designed to be a straight-forward resource manual with easy-to-locate information. When an issue arises, staff should first refer to the VDR for advice on how to proceed.

The format is a mix of text, charts, links, sample materials, and templates. Many VDR passages refer directly to a corresponding VISTA Regulation from which the policy or procedure is crafted.

VISTA regulations reflect how VISTA has decided to implement and interpret its statute, the Domestic Volunteer Service Act of 1973, as amended¹ (DVSA), and they are legally binding.

The regulations specifically address issues including but not limited to eligibility, termination, sponsors, Summer Associates, restrictions, protections, terms, and benefits. Identifying the specific regulation can be very helpful, especially when background information is needed to clarify or reinforce decisions.

The current VISTA regulations are registered as 45 C.F.R. § 2556—VOLUNTEERS IN SERVICE TO AMERICA.² Please see Chapter 3: VISTA Purpose and Legal Framework for more information regarding VISTA’s legislative history and requirements as a federal program.

Management and Oversight

The overall management and oversight of the VDR falls under the VISTA Deputy Director and Management Analyst.

The VISTA Deputy Director reviews and approves VDR updates and revisions. The Management Analyst is the policy coordinator and will 1) manage ad hoc updates, 2) facilitate an annual review and revision cycle, 3) guide the policy creation and maintenance process, and 4) oversee document retention for audit purposes. The Management Analyst is not responsible for drafting VDR language but rather supporting the review and revision process by ensuring all participants understand their roles and have the appropriate documentation, resources, and support necessary to be successful.

Chapter Ownership

Each VDR chapter is owned by a unit within VISTA – i.e., VISTA’s Program Impact and Operations (PIO) unit, the VISTA Training Unit (VTU), VISTA Member Support Unit (VMSU), Marketing, Outreach, and Recruitment (MOR), VISTA Management, or a cross-team workgroup. Some chapters might have primary and secondary unit owners.

Chapter ownership is identified at the beginning of each chapter in a table that also includes the revision and effective dates. The primary chapter owner is typically the same as the author or subject matter expert (SME), and it is essential for this individual or team to be well versed in the subject matter and related issues.

¹ [The Domestic Volunteer Service Act \(http://www.nationalservice.gov/legislative/domestic-volunteer-service-act-1973-amended-serve-america-act\)](http://www.nationalservice.gov/legislative/domestic-volunteer-service-act-1973-amended-serve-america-act)

² [45 C.F.R. § 2556—VOLUNTEERS IN SERVICE TO AMERICA \(http://tinyurl.com/VISTARegs\)](http://tinyurl.com/VISTARegs)

The primary chapter owner authors ad hoc updates and manages the annual review and revision of the chapter. The primary owner is responsible for coordinating with the secondary owner(s) to ensure information is up to date. Additionally, the primary and secondary owner(s) will prepare training materials, communications, and ensure changes are reflected and captured in other VISTA bodies of knowledge, i.e., VISTA Member Handbook, Supervisor Manual, VISTA Campus, etc.

Annual Review

Each fall, the Management Analyst will facilitate an annual review of the VDR to ensure the document remains accurate, current, and relevant. During the annual review period, chapter owners will edit the chapters and supporting materials for content, clarity, and relevance.

This includes a thorough review of all VDR chapters and corresponding addenda, templates, training materials, etc. by the chapter owners. Updates and changes completed during the annual review will follow the approval process mentioned later in this chapter and as displayed in Appendix 1A.

Substantial or Minor Content Update

Revisions, updates and changes to the VDR fall into one of two categories: substantial or minor. A substantial change is defined as the introduction of a new policy or a change to definition or substance that requires the review of the Office of General Counsel. A minor change is defined as the removal or addition of content to clarify and/or strengthen an existing process or policy.

Ad Hoc Updates

When a time-sensitive and significant update is necessary, VDR chapters will be modified via ad hoc updates. Ad hoc updates should be the exception, not the norm, and will follow the approval process mentioned later in this chapter and displayed in Appendix 1A.

Approval Process

VDR updates will be reviewed for the following factors: content, readability, legality, and strategic alignment. Minor updates to the VDR will be reviewed and approved by the SME's or owner's manager, the Management Analyst, and the Deputy Director. Substantial updates to the VDR will also be reviewed by the Office of General Counsel to ensure legality. See Appendix 1A for an approval flowchart.

Effective Dates

An effective date is when a policy or procedure takes effect and must be followed. A table at the beginning of each VDR chapter identifies the effective date.

Previous rights, privileges or practices will be honored until the effective date of an updated policy or procedure. After the effective date, all cases connected to the policy or procedure must follow the new guidance.

Communication and Notification Plan

When VDR information is added or modified, CSOs will be notified in a variety of ways, including but not limited to: email notification, cluster call announcement, and posting on the VISTA Policy SharePoint page: <https://cns.gov.sharepoint.com/sites/VISTA/Policy/default.aspx>. The goals of the communication plan are to 1) give an overview of the change; 2) raise awareness about the change; 3) share tools or resources related to the change; and 4) assist in preparing for the change. The VISTA Policy Group (introduced in Chapter 2: Who's Who in the VISTA Network) is essential to successfully notifying our CSO colleagues about changes.

When You Have a Question

If CNCS staff have a question related to any topics covered in the VDR, please email vdr@cns.gov and cc the corresponding VISTA team member assigned as a cluster representative (see Chapter 31: When You need to Talk to a Person). The vdr@cns.gov inbox is monitored by the Deputy Director and Management Analyst and emails will be routed and replied to accordingly.

How to Offer Suggestions

Suggestions for additional information, corrections, and deletions are always welcome. The electronic format allows the Desk Reference to change according to the needs of its users.

To offer suggestions, send an email to vdr@cns.gov. In the subject line, indicate the chapter for which the suggestion is intended.

Terms Used in the Desk Reference

The following are some common terms and acronyms used throughout the Desk Reference. See [45 C.F.R. §2556.5](#) for specific definitions in the VISTA regulations.

Alum

Individual who has completed VISTA service (alumnus/alumna)

Bodies of Knowledge

Resource materials related to VISTA including but not limited to the following: VDR, VISTA Member Handbook, Supervisor Manual, Program Guidance, PSO Workbook, Supervisor Workbook, Leader Workbook, Leader Manual

Candidate

Individual who has been approved for VISTA service but not sworn in

CNCS

The Corporation for National and Community Service

CSO

CNCS State Office or CNCS State Office staff

DVSA

[Domestic Volunteer Service Act of 1973, as amended](#)

FFMC

Field Financial Management Center

Headquarters or VISTA HQ

VISTA Headquarters staff, including the VMSU located in Austin

Management

VISTA Director, Deputy Director, Management Analyst, and Unit Managers

MOR

VISTA Marketing, Outreach, and Recruitment Unit

My AmeriCorps Portal

Online portal designed to help candidates apply for AmeriCorps opportunities and members manage their AmeriCorps experience (<https://my.americorps.gov/mp/login.do>)

MSY

Member service year

OGC

Office of General Counsel

Program

The VISTA program

Project

Anti-poverty activities carried out in a low-income community

PIO

VISTA Program Impact and Operations Unit

Serve America Act

[Edward M. Kennedy Serve America Act](#)

Sponsor

Nonprofit organization or government agency that the CSO approves and provides resources to operate a VISTA project

Strategic Plan

The four CNCS-wide strategic goals are: Increase the impact of national service on community needs; create opportunities for participants to become civically engaged; maximize the value we add to grantees, partners, and participants; and fortify our management and internal operations (<http://www.nationalservice.gov/about/strategic-plan>)

T&TA

Training and technical assistance

VDR or Desk Reference

VISTA Desk Reference

VISTA

Volunteers In Service To America program or an individual who serves at a project sponsor site, depending on context

VISTAs

Individuals who serve at project sponsor sites

VISTA Regulation

Legally binding federal regulations that set forth the requirements of the VISTA program accessible here: <http://tinyurl.com/VISTAREgs>

VMSU

VISTA Member Support Unit

VTU

VISTA Training Unit

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Chapter 2:

Who's Who in the VISTA Network

Chapter Owners: VISTA Management

Effective Date: October 15, 2016

Reviewed: September, 2016

Overview of Roles

The [Corporation for National & Community Service](http://www.nationalservice.gov) (CNCS) (<http://www.nationalservice.gov>) has a Headquarters Office in Washington, D.C., and 47 field offices, called CNCS State Offices (CSOs), in most states throughout the country. The CSOs administer the [VISTA program](http://www.nationalservice.gov/vista) (<http://www.nationalservice.gov/vista>), the [Senior Corps program](http://www.nationalservice.gov/seniorcorps) (<http://www.nationalservice.gov/seniorcorps>), and other CNCS initiatives.

VISTA is a national program that provides full-time and Summer Associate VISTAs to nonprofit organizations and government agencies to achieve its mission (see Chapter 3: VISTA Purpose and Legal Framework).

VISTA HQ

VISTA HQ, in consultation with the CSOs and CNCS staff, determines goals, policies, administrative procedures, and budgetary requirements for effective and efficient program operation. The HQ office performs the following tasks:

- Monitors progress toward achieving national program goals and priorities
- Allocates VISTA resources among states
- Sets VISTA policies and procedures
- Prepares reports to Congress, the White House, and the public
- Researches and shares effective program models
- Develops and implements training, professional development, and technical assistance for VISTAs, Leaders, and sponsors
- Administers VISTA support services, such as health care, child care, payments and reimbursements for living allowances and travel, and enrollments in the Eli Segal AmeriCorps Education Award or end-of-service stipend
- Guides recruitment and outreach efforts to potential VISTAs and sponsors

VISTA Member Support Unit

The VISTA Member Support Unit (VMSU) is part of VISTA HQ but, due to their special functions that support members and CSOs, the group requires additional explanation. The VMSU, based in Austin, TX, provides a full array of administrative support to VISTA members, alumni, and CSOs. This support includes assistance for the member application, enrollment forms, training events, active service, end of service, and post service. The VMSU also serves as the repository for VISTA member files and a primary resource to answer questions from members about their service, forms, travel, etc.

The VMSU handles administrative functions and activities including but not limited to:

- Approving relocation travel
- Arranging emergency travel
- Assisting CSOs with completing member actions in the My AmeriCorps portal
- Processing VISTAs into eSPAN for payroll-related actions
- Answering VISTAs' questions during their year of service
- Assisting VISTAs with In-Service Training (IST) as needed
- Processing early terminations, requests for extensions and reenrollments, and close of service
- Assisting VISTAs with using the My AmeriCorps portal

VISTAs may contact the VMSU via the National Service Hotline at 800-942-2677 or at VMSU@cns.gov. Additional contact information for the VMSU follows:

VMSU
300 East 8th Street
Suite G-169
Austin, TX 78701-3220
Fax: 512-916-7021

CNCS State Office

The role of a [CNCS State Office](http://www.nationalservice.gov/stateoffices) (CSO) (<http://www.nationalservice.gov/stateoffices>) is outreach, project development, technical assistance, monitoring and evaluation, and VISTA member support. Major duties of CSO staff are:

- Respond to technical assistance requests from potential sponsoring organizations that wish to develop proposals for VISTA projects
- Assist potential sponsors in refining project goals and objectives, in determining if the project is in accordance with the VISTA mission, and in ensuring that self-sustaining activity will be achieved within the low-income community

- Approve or disapprove an organization’s concept paper and application
- Arrange for supervisors to attend supervisors training
- Approve or disapprove a sponsor’s selection of a VISTA applicant
- Arrange for VISTA candidates to attend Pre-Service Orientation
- Swear in or deselect candidates at Pre-Service Orientation
- Support VISTAs and sponsors during project implementation with in-service training and technical assistance
- Monitor project activities
- Review progress reports

VISTA Policy Group

The VISTA Policy Group is composed of two distinct subgroups: the VISTA Policy Core Group and the VISTA Policy Advisory Group. Each group has unique roles and special functions related to the development of VISTA policy, procedure, and the VDR, and together they make the VISTA Policy Group. The coordinator and main point of contact for the VISTA Policy Group is the VISTA Management Analyst.

The VISTA Policy Core Group membership includes individuals from VISTA HQ including: the VISTA Deputy Director, the VISTA Management Analyst, and at least one representative from each unit: VTU, VMSU, PIO, and MOR. The Office of General Counsel will be consulted as needed for significant policy matters. The VISTA Policy Core Group develops policy, procedure, training materials, etc. and ensures the VISTA bodies of knowledge remain relevant and up-to-date.

The VISTA Policy Advisory Group (PAG) membership includes individuals from outside of VISTA HQ that interact with VISTA HQ or the VISTA program on a regular basis. The Policy Advisory Group provides feedback to VISTA’s Deputy Director and Management Analyst on proposed and existing policies and procedures for continuous improvement and clarity.

The Policy Advisory Group comprises representatives from the following areas: CSOs, Area Managers, OGC, FFMC, and other offices or units as needed given the policy topic. Special consideration will be taken to ensure that CSO group membership represents the diversity of our CSO colleagues and the projects they oversee (e.g., urban, rural, large, and small projects, national and local, etc.).

Sponsors^{3,4}

A VISTA serves under the auspices of a sponsor — a federal, state, or local government agency; a government of an Indian nation; or a private or public nonprofit organization. The sponsor, in turn, partners both with the low-income community it serves through its mission or project design and with the VISTA.

The sponsor:

- Develops a project plan that incorporates the VISTAs to build long-term solutions to poverty-related issues within a local community
- Engages residents of the low-income community to ensure the project is responsive and relevant to the low-income residents
- Leverages community resources
- Expands the capacity of the community and its own organization to sustain the project when the VISTAs finish their terms of service
- Recruits VISTAs locally or nationwide
- Prepares a VISTA Assignment Description for each member
- Supports the VISTAs as they work to expand the organization’s capacity to sustain the project
- Supervises, trains, and provides administrative support to the VISTAs
- Monitors and reports on project progress, through Project Progress Reports (PPRs)
- Ensures that the VISTA regulations and guidelines are met
- In some cases, cost-share the VISTA living allowance and other expenses in some cases

If awarded grant funds, the sponsor has these additional responsibilities:

- Comply with the terms and conditions of the Notice of Grant Award, the Uniform Guidance for Federal Awards at 2 C.F.R. Parts 200⁵ and 2205⁶, and account for grant funds
- Perform criminal history background checks for all project staff in covered positions – i.e., all project staff – assigned to the project who receive any portion of their salary from CNCS grant funding
- Pay the VISTA living allowance, end-of-Service cash stipend (but not the Education Award) and other miscellaneous costs to VISTAs if receiving a Program Grant

³ [45 C.F.R. §2556.100 \(2016\).](#)

⁴ [45 C.F.R. §2556.105 \(2016\).](#)

⁵ [2 C.F.R. Part 200 \(2016\).](#)

⁶ [2 C.F.R. Part 2205 \(2016\).](#)

The Community

Community, as distinguished from the sponsor, may be defined geographically (e.g., neighborhood), demographically (e.g., school children) or by affinity (e.g., individuals seeking food security for the household). In VISTA, the concept of community is meant to designate the residents of a low-income area. The central idea behind VISTA is that the project is done with the residents, not to or for them. Representatives of the community:

- Plan with the sponsor to develop a project
- Work with the sponsor directly and indirectly during project implementation
- Share, receive, and transfer skills, attitudes, and behaviors mutually
- Assume responsibility of the project's activities at the end of VISTA service

VISTAs

VISTAs make a full-time, one-year commitment to alleviate poverty in a particular community.

VISTAs:

- Serve as a catalyst and change agent
- Mobilize community resources
- Increase the capacity of the low-income community to achieve its goals
- Ensure that the project activities are able to be sustained at the end of VISTA service
- Fulfill the VISTA Assignment Description
- Follow the rules and guidelines in the Member Handbook

Leaders ⁷

Leaders have successfully completed a term of full-time service with VISTA, AmeriCorps, NCCC, VISTA or the Peace Corps, and demonstrated exemplary skills and leadership in community service. Leaders may not perform administrative or supervisory functions for their sponsor or CSOs. Leaders are assigned to some larger projects or regions to assist sponsors and VISTAs in achieving project objectives and developing new project activities and sources of community support.

Leaders:

- Provide support for VISTAs in their project or region
- Coordinate VISTAs to increase the impact of the project

⁷ [45 C.F.R. §§ 2556.300-365 \(2016\)](#).

Summer Associates^{8,9}

The VISTA program allows for existing project sponsors to supplement their anti-poverty activities with an infusion of "hands-on volunteers" during the summer months. Unlike year-round VISTAs, Summer Associates are not limited in their ability to perform direct service activities. VISTAs may serve as mentors and coordinators for the Summer Associates. This summer program is a prime opportunity to introduce individuals, particularly college-age students, to national service with the hope it will lead to their participation in full-time programs later on.

The Summer Associates program offers individuals the opportunity to participate for 8, 9, or 10 weeks during the summer months in an intensive level of summer service that expands on existing sponsors' service plans. Summer efforts, combined with ongoing VISTA programming, should result in:

- Furthering one or more of the CNCS strategic initiatives
- A credible effort to help people escape poverty, not simply make poverty more tolerable
- Outcomes that increase the project's impact on those being served

Field Financial Management Center

CNCS operates a central financial service center, called the Field Financial Management Center (FFMC), which is part of the Chief of Operations team. The FFMC is located in Philadelphia, PA.

The FFMC provides the CSOs with grant award and management services for VISTA. In addition, the FFMC provides administrative support to the CSOs – for example, processing procurement requests and obligations and reimbursements for VISTA-related travel.

VISTA Help Desk

Frequently referred to as Accounting, the Accounting and Financial Management Services department is located within the Chief Financial Office (CFO) at Headquarters. It is also called VISTAHD, the VISTA Help Desk.

Accounting provides several VISTA-related support activities, including management of the VISTA member payment process; VISTA accounts and receivables; reissuing lost checks; reissuing duplicate IRS forms, including W-2 and 1099, for VISTA members; and cost-share billing.

⁸ [45 C.F.R. §2556.500 \(2016\).](#)

⁹ [45 C.F.R. §2556.505 \(2016\).](#)

Office of National Service Trust

Frequently referred to as the Trust, the Office of the National Service Trust within CNCS manages the various functions related to the Eli Segal AmeriCorps Education Award. This office reports to the Director of Accounting and Financial Management Services in the CFO. To assist this office, a portal is operational for AmeriCorps members (including VISTAs) to obtain information and make transactions.

Duties of the National Service Trust include:

- Providing information to members and programs regarding the Trust
- Enrolling members in the Trust and documenting their service
- Providing Education Awards to members who successfully complete their service
- Helping members use their earned Education Awards and making appropriate payments to schools and loan holders as directed by members
- Helping members obtain forbearances on the repayment of their qualified student loans and making appropriate payments for interest that accrued while the members were serving
- Managing the investments of the Trust

National Service Hotline

Frequently referred to as the Hotline, this service is operated via a CNCS contract. VISTA members may call the Hotline with questions including but not limiting to the following topics: MyAmeriCorps portal, benefits, living allowance, required paperwork and forms, and Education Awards. As stated earlier, VISTAs may reach the VMSU by calling the Hotline. Questions that cannot be answered by Hotline contractors are then elevated to the VMSU.

The Hotline can be reached at:

Toll Free: 800-942-2677 (public)

Internal: 703-206-7277 (STAFF ONLY)

Fax: 703-206-7276

questions.nationalservice.gov (<https://questions.nationalservice.gov/>)

Hours:

-9:00 a.m. to 7:00 p.m. EST, Monday through Friday, during the months of January, May, June, July, August, and September.

-For the months of February, March, April, October, November and December, normal hours of operations are: Monday through Thursday: 9:00 a.m. to 7:00 p.m. EST. Friday: Closed.

-The hotline is closed on all federal holidays.

Logistics Contractor

CNCS hires a contractor to fulfill the role of a logistical support provider for trainings and events. The duties primarily include (in coordination with CSO staff, VISTA HQ, and the FFMC) making VISTA travel arrangements, providing training event on-site logistics, and all aspects of contracting with the event location. Logistics provider services also include:

- Contacting individuals for whom travel information is missing and following up on other special instructions from CSOs
- Securing best fares, itineraries, e-tickets, and paper tickets (Amtrak)
- Sending packets along with travel information and itineraries to candidates prior to a training event
- Sending CSOs copies of the invitation packet when requested
- Sending CSOs and the FFMC compiled itinerary information for the travelers for their territory prior to the event
- Canceling tickets for event no-shows

Health Care Benefits Contractor

CNCS hires a contractor to administer the health care allowance program as well as the health benefits plan for those VISTAs exempt from securing coverage under the Affordable Care Act. More information is available in VDR Chapter 24: Health Care and Child Care Benefits.

Child Care Benefits Contractor

CNCS hires a contractor to administer childcare support for eligible VISTA members. More information is available in VDR Chapter 24: Health Care and Child Care Benefits.

CNCS Points of Contact for Health Care and Child Care Benefits

The Contracting Officer's Representative (COR) responsible for the management of VISTA's healthcare contract and childcare contract is [Jennifer Veazey](mailto:jveazey@cns.gov) (jveazey@cns.gov, 202-606-6770) in the Office of the Chief Program Officer. The VISTA point of contact for health care is [Craig Kinnear](mailto:ckinnear@cns.gov) (ckinnear@cns.gov, 202-606-6708).

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Chapter 3:

VISTA Purpose and Legal Framework

Chapter Owners: VISTA Management

Effective Date: October 15, 2016

Reviewed: September, 2016

Purpose of VISTA Program ¹⁰

[AmeriCorps VISTA](http://www.nationalservice.gov/vista) (Volunteers in Service to America) (<http://www.nationalservice.gov/vista>) is an anti-poverty program that provides full-time volunteers to nonprofit organizations and local agencies that serve low-income communities. The program's purpose, as defined by law, is to strengthen efforts to eliminate poverty by encouraging people from all walks of life to engage in meaningful volunteer service. The law describes four main objectives of the program:

1. To generate the commitment of private sector resources
2. To encourage volunteer service at the local level
3. To support efforts by local agencies and community organizations to achieve long-term sustainability of projects
4. To strengthen local agencies and community organizations that serve low-income communities

The program has been addressing the needs of impoverished communities for more than 50 years. VISTA builds the capacity of not only communities but also of the VISTAs who work there. It provides the ability to bring local and national resources to bear on local issues. VISTA also makes it possible to balance scarce skills with community knowledge and capital.

VISTA embraces the following *key principles*:

- **Anti-poverty Focus** — The purpose of VISTA is to support efforts to fight poverty. Any nonprofit organization, educational institution, tribal or public agency with a program that is poverty-related in scope can apply to sponsor a VISTA project. The project's goal should address helping individuals and communities out of poverty through long-term solutions rather than through short-term services.
- **Sustainable Solutions** — VISTA members are a short-term resource, who work to ensure the long-term sustainability of anti-poverty programs. All VISTA projects should be developed with a goal of an eventual phase-out of the need for VISTA members.

¹⁰ [45 C.F.R. §2556.1 \(2016\)](#).

- **Capacity Building** — VISTA assigns members to organizations to expand the ability of those organizations to fight poverty. Through activities such as fundraising, volunteer recruitment and management, community outreach, and partnership development, VISTA members help organizations achieve lasting solutions to poverty.
- **Community Empowerment** — Organizations working with VISTA must ensure that the project engages residents of the low-income community in planning, developing, and implementing the project. The project must be responsive and relevant to the lives of the community residents, and should tap into inherent community strengths and resources.

Legislative History

VISTA was originally created in 1964 by the Economic Opportunity Act as part of the “War on Poverty.” In 1973, the program was reauthorized with the passage of the [Domestic Volunteer Service Act of 1973](http://www.nationalservice.gov/pdf/dvsa_dec99.pdf), as amended, (DVSA) (http://www.nationalservice.gov/pdf/dvsa_dec99.pdf), and it became part of a new federal agency called ACTION, the Federal Domestic Volunteer Agency. In 1990, the [National and Community Service Act of 1990](http://www.nationalservice.gov/pdf/cncs_statute.pdf) (http://www.nationalservice.gov/pdf/cncs_statute.pdf) created the new AmeriCorps program and moved the national services programs in ACTION to the Commission on National and Community Service. In 1993 a new federal agency, the Corporation for National & Community Service (CNCS), was created. VISTA formally fell under the AmeriCorps national service program umbrella and became known as AmeriCorps VISTA. In 2009, the DVSA was amended again upon the passage of the [Edward M. Kennedy Serve America Act of 2009](http://www.nationalservice.gov/about/legislation/edward-m-kennedy-serve-america-act) (<http://www.nationalservice.gov/about/legislation/edward-m-kennedy-serve-america-act>). The Serve America Act did not change the fundamental purpose or the structure of the VISTA program but did codify project sustainability as a key objective of the program.

Legal Framework

VISTA operates under parameters defined by federal law, federal regulations, and agency policies and guidance. It can be helpful to know where to find the relevant legal requirements when learning how to manage the VISTA program at the local or national level. The following section is an overview of this documentation.

Legislation

The legislation under which the VISTA program operates is the Domestic Volunteer Service Act of 1973, as amended, (DVSA) and certain provisions of the [National and Community Service Act of 1990](http://www.nationalservice.gov/pdf/cncs_statute.pdf) (http://www.nationalservice.gov/pdf/cncs_statute.pdf), as amended (NCSA). The DVSA

is the law, or statute, enacted by Congress, that outlines the purposes of the program and the parameters within which it may operate. By law, CNCS cannot operate the program in any way that violates these parameters. A current copy of the DVSA is available on the CNCS website at: http://www.nationalservice.gov/pdf/dvsa_dec99.pdf.

Regulations ^{11,12}

Statutes, such as the DVSA, tend to be very broad. Congress often leaves the details of the law to the federal agency charged with its implementation. Congress grants executive branch agencies, such as CNCS, with authority to interpret the law and develop the programmatic details. Many of these details ultimately appear as regulations, codified in the Code of Federal Regulations (CFR).

Regulations are developed through a process known as Rulemaking, which involves publication in the Federal Register to allow for public comment. Regulations have the weight of law, but they can be amended through Rulemaking at any time. The regulations that pertain to AmeriCorps VISTA are accessible on the CNCS website at: <http://tinyurl.com/VISTAREgs>.

Policies

As necessary, the Director of VISTA may issue written policies to clarify or update details of the program not defined elsewhere. These policies must be consistent with the statute and program regulations. Formal policies are issued through policy memos and saved on the VISTA intranet.

Program Guidance

Each year, the Director of VISTA issues program guidance to current and potential VISTA project sponsors and CNCS State Office staff. This guidance provides directions about programming priorities and national initiatives. Current and prior program guidance is available at: <https://cns.gov.sharepoint.com/sites/VISTA/pio.html/default.aspx>.

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¹¹ [45 C.F.R. §2556.3 \(2016\)](#).

¹² [45 C.F.R. §2556.7 \(2016\)](#).

Chapter 4:

Managing Resources and MSY Production

Chapter Owners: VISTA Management, and Program Impact and Operations

Effective Date: October 15, 2016

Reviewed: September, 2016

The Appropriations Process – How Does VISTA Get Its Budget?

VISTA receives its funding through the same process as other Executive Branch federal agencies. Congress passes an annual appropriation that covers funding for one fiscal year, which starts on October 1 and ends on September 30.

The process for an appropriation actually starts fifteen months before the beginning of the fiscal year. At that time, the Director of VISTA prepares a budget request that outlines projected costs and how VISTA intends to use the money. This request is prepared in collaboration with VISTA staff, the Budget Office, and the Field Financial Management Center (FFMC), who help to determine anticipated cost factors, such as health care and cost of living, and calculate the number of VISTA members a set dollar amount can support. VISTA then develops programming priorities and a justification for using the money, as well as a performance plan that will measure effectiveness in using the funds to support the program.

This request is sent to the Office of Management and Budget (OMB) and a negotiation process begins. Once a budget is agreed upon, the final amount is included in the President's budget request, which is submitted to Congress by the President in late January or early February.

Congress then begins determining the final amounts and activities. During this process, members of Congress often transmit "questions for the record" to CNCS, asking programs to clarify details in the budget justification. The goal is for Congress to pass the appropriation by October 1. It is not always possible for Congress to reach a final decision by the beginning of October. In that case, Congress will pass a short-term spending bill, known as a Continuing Resolution (CR). A CR allows the agency to function by apportioning dollars, for several weeks or months at a time, usually at the previous year spending levels.

Once VISTA receives its appropriation from Congress, CNCS must manage the funds so that we neither underspend nor overspend. Spending more than the appropriation is illegal and puts CNCS in violation of the [Anti-Deficiency Act](http://www.gao.gov/legal/anti-deficiency-act/about) (<http://www.gao.gov/legal/anti-deficiency-act/about>). Any money not obligated by the end of the fiscal year, by law, expires. If large sums

of money remain at the end of the year, it can indicate poor management and increase the risk of receiving a smaller appropriation in the future.

Most CNCS programs provide grants that can be obligated by the end of the year. VISTA, which funds the expenses of placing individuals in service, is more complex. Managing this process is the job, not only of VISTA HQ and the CNCS Budget Office, but also of every CSO. The CSO's ability to manage local VISTA resources through the tracking and monitoring of member service years (MSYs) is an essential component to the overall success of the VISTA program.

The current CNCS Congressional Budget Justification is available on the CNCS website at <http://www.cns.gov/about/budget>.

VISTA Service Years

For management purposes, VISTA expresses its budget in terms of member service years or MSYs. An MSY is the average cost of one VISTA member serving for an entire fiscal year. This cost includes direct expenses such as living allowances, as well as indirect expenses such as recruitment and outreach. In FY 2015, the appropriation of \$92.364 million translated into 5,472 MSYs.

The number of MSYs available in the budget does not equate to the actual number of individual members on board during a fiscal year. One VISTA rarely (if ever) uses exactly one MSY. To do so, the VISTA would have to start service on October 1 and end on September 30; this timetable almost never happens. Typically, a VISTA "uses up" a portion of an MSY during the course of one fiscal year. For example, a VISTA member who serves from April 1 through September 30 in the current fiscal year, uses up 6 of 12 months – or ½ of an MSY. Assuming the member completes the term, the member uses up an additional ½ of an MSY in the next fiscal year.

There are several MSY categories relating to the type of VISTA members each one supports. There are budget implications for each of these categories and the categories are:

MSY Type	VISTA Member Type
Standard	VISTA members supported directly by CNCS
Cost Share	Members supported by cost share agreements in which sponsors pay for the living allowance
Grants	VISTA members of any kind supported through grants (can be standard or cost share)

In addition to these categories, there are three types of VISTA members: VISTAs, Leaders, and Summer Associates. All three of these types may fall under any of the MSY categories listed above.

VISTA Purpose Codes

Each VISTA member is assigned a Purpose Code in the database that defines the member’s MSY category and member type. This way the system knows how to treat each member for purposes of payroll. VISTA uses these codes for projecting and monitoring the budget throughout the year. The chart below outlines the codes for each of the MSY and member types.

	Standard (non-Grant)	Cost Share	Grant	Grant Cost Share	Gift Fund	Federal Fund
VISTA	A22	Q09	A21	Q21	G22	F22
Leader	A20	Q19	A30	Q30	G20	F20
Summer Associate	A28	Q29	A26	Q26	G28	F28

Allocations

Prior to the beginning of the fiscal year, VISTA HQ works with the Area Managers to allocate the available MSYs to each of the Clusters. These allocations are determined through a combination of factors, including prior year fill rates, regional poverty levels, and Cluster needs.

Through a similar process, Area Managers then work with State Office directors to allocate the Cluster MSYs to each of the states. It is up to each CSO to manage the VISTA placements throughout the year to ensure that all of the MSYs allocated are used.

To give CSOs time to prepare, VISTA allocates these resources in advance of the fiscal year. CSOs should remember, however, that the program will not have a final appropriation from Congress until October 1 at the earliest. VISTA HQ usually has a good indication of what the appropriation may be. However, until Congress passes the appropriation, there is always the chance of adjustments up or down.

Cluster Budgets

Once the allocations have been made, Area Managers work closely with the FFMC and the Budget Office to develop a Cluster Budget based on the allocation. This budget contains line items to cover the expenses associated with supporting the allocated MSYs. Line items in the budget include end-of-service stipends, subsistence, training, and limited project support.

Once the budget development process is complete, VISTA HQ reviews the budget and negotiates with each Cluster. VISTA HQ reviews quarterly the Cluster budgets with the Area Managers to ensure that the allocated MSYs are being used as forecast. Any under or over production of MSYs must be identified and corrected to ensure spending the annual appropriation.

A copy of the Cluster budget submission can be found on the CNCS Shared (“S”) drive in the [VISTA Budget and Production](#) folder (\\cns.gov\data\shared\VISTA Budget and Production). Not all CNCS State Office staff have access to this folder. Requests for access must go through your State Program Director and Area Manager before final submission to the VISTA Deputy Director for approval.

Managing MSYs

Each CSO is responsible for managing its allocation of MSYs by accounting for members currently in service (on board), and by planning for the termination and placement of members throughout the year. This process must be monitored very closely to ensure that all allocated MSYs are used by the end of the year. Management of MSYs ensures that neither overspending nor underspending the appropriation from Congress occurs.

MSY Charts

To help staff keep track of its MSY production, State Office staff use a tool known as the MSY chart. MSY charts track new member entries during the current fiscal year, projected terminations (including early terminations), reenrollments for another year in the program, and extensions of service for less than a year. The charts take all of this data and, through a series of formulas, calculate the monthly and annual MSY production at any given time.

The MSY charts can be found on the [My AmeriCorps \(Staff\) - Login \(http://espan2.cns.gov/csr\)](http://espan2.cns.gov/csr). Enter network log-in credentials to access the Portal, and then click on “Reports” to find the MSY charts.

Additional information about MSY charts can be found on the [VISTA Campus \(https://www.vistacampus.gov/msy-charts\)](https://www.vistacampus.gov/msy-charts).

The MSY charts are configurable to allow CSOs to view all of the rows in a chart or only a subset (Leaders or Cost Share, for example). On each of these charts, CSO staff enter data about projected VISTA member actions, including VISTAs attending PSO, PSO trainees placed on projects, placements, close of service, reenrollments, and early terminations into designated cells.

The information on the charts is used for making strategic decisions in managing VISTA resources at the state, cluster, and national levels. Most importantly, CSO staff use MSY Charts to forecast levels to meet the targets and to make programming decisions. VISTA HQ uses the information to project how many MSYs will be produced to stay within budget, and to project the number of Segal Education Award slots that will be needed for the year. Training staff use the information to plan for Pre-Service Orientation (PSO) events throughout the year.

MSY charts must be kept as accurate as possible at all times.

How to Use MSY Charts — The Nuts and Bolts

PREPARING CHARTS FOR THE NEW FISCAL YEAR

Each year, the MSY charts for the following fiscal year will become available in August to allow adequate time for planning. When CSO targets are entered into MSY charts, CSO staff may begin developing a plan for the fiscal year. Note the months of scheduled PSOs and be aware of cluster strategies in terms of when to place new members.

The CSO can draft the MSY charts for the new fiscal year before a budget and a state MSY allocation are revealed. In preparing a draft plan, export the charts to Excel files and save them locally on a computer for planning purposes. Delete only the data in the light blue cell. The other cells contain formulas and deleting that data will cause the charts to miscalculate. Use these charts to do the planning. Have a conversation with the Area Manager to determine an approximation for specific MSY allocations. Note the months of scheduled PSOs and be aware of cluster strategies in terms of when to place new members. Once the data is entered on the official MSY charts for the new fiscal years, be certain to carry over to the new charts the number of members in service on September 30 as residuals in service on October 1. Those numbers must be accurate and identical.

ENTERING MSY ALLOCATIONS/TARGETS

In August, VISTA HQ will enter Cluster allocations into the charts. Area Managers will then enter state level targets for standard and cost share MSYs. These allocations/targets may change during the year as State Offices and the Area Manager manage VISTA resources to reach cluster MSY production goals.

Note that while the Cluster will receive an allocation for Grant MSYs to be funded during the fiscal year, the CSOs will not receive a target for grant MSYs. Grant MSYs are treated differently from non-grant MSYs, as they only impact the budget when the grant is awarded. The CSOs will, however, track production of grant MSYs that have already been funded. For more on this topic, see the section below on Grants and Grant Workbooks.

ENTERING RESIDUALS ON BOARD

“Residuals” refer to the number of members on board as of the first day of the fiscal year. The system will populate the charts with real-time data; therefore, on October 1, the charts will automatically show the number of members on board as of that date.

However, since initial planning will begin *prior* to that date, CSO staff will have to enter their best estimate of what that number will be. If the current-year charts are up to date, the year-end onboard strength can be used to determine the level of residual members on board at the start of the next year. Once the residuals are entered, the charts will forecast the number of MSYs that residuals will produce by the end of the fiscal year. When that production number is established, the chart is ready for completion.

On October 1, the system will override the manually entered residuals with the actual number from the database. If this number is different from what had been entered previously, this difference will result in changes to the MSY projections for the year, and adjustments may have to be made.

ENTERING PROJECTED MEMBER ACTIONS

While preparing the charts for the new fiscal year, the CSO needs to project the number of personnel actions it anticipates throughout the year. Member actions include Early Terminations, Reenrollments, and Close of Service. To produce accurate estimates for these member actions, the CSO staff reviews the states’ past performance in these areas. MSY charts for the past years are available in the Portal; versions for 2012 and earlier are stored on the Shared drive in the [MSY Archives folder](#) (\\cns.gov\Data\Shared\VISTA Budget and Production\MSY Folders - ALL\MSY Archives). The CSO may review its MSY charts for the last three fiscal years, compute those rates, and then apply those rates and enter data on the charts. As the months progress, the CSO staff needs to analyze and glean data from projects as to the future plans of members in order to make more accurate projections.

ENTERING NEW PLACEMENTS

Once the residual section of a chart is completed, CSO staff determine the number of new placements that can be made during the fiscal year. To begin this process, CSO staff subtract the projected number of MSYs produced by residual members from the MSY allocation/target, and the result is the number of MSYs a state has to produce with new PSO placements and/or reenrollments. Keep in mind that a member placed in November uses approximately 10.5 months of a MSY, whereas a member placed in August uses approximately 1.5 months of an MSY. Working with the Area Manager, CSO staff develop a strategy in terms of when to place members based on budget factors, project needs, and the availability of a pool of qualified talented applicants.

Some research is necessary for the CSO staff to know the state's historical PSO fill rates for the months in which PSOs fall. Be aware that a state may not be able to roll forward unfilled slots from one PSO to the next because placing large numbers late in the fiscal year may negatively affect the budget of the next fiscal year. Coordination with the Area Manager is essential because the Area Manager is responsible for the overall cluster VISTA budget and MSY production.

MANAGING THE CHART EACH MONTH

Once the MSY charts are completed for the new fiscal year, the CSO manages the chart to meet MSY production goals. MSY charts are not static. Projections change as VISTAs and applicants make decisions, as projects make decisions, as recruitment and placement targets are reached or not reached, and as the budget may fluctuate.

The database will update the actual placements made. If this number differs from what was planned, the CSO will have to change projections for future months to ensure that MSY production is neither too high nor too low. Projections may also be changed based on the latest information from projects, members, trainees, and the Area Manager.

The CSO needs to be aware of what may happen in the future in terms of reenrollments, early terminations, extensions, and new placements.

GENERAL GUIDELINES AND HELPFUL HINTS

- Update MSY charts no later than the eighth of each month, or earlier if directed to by your Area Manager.
- Develop a process for collecting data and estimating data to be entered on the charts. Data to be managed includes:
 - Residuals on board October 1
 - Projected and actual residual early terminations
 - New placement projected and actual early terminations
 - Projected and actual COS numbers
 - Projected and actual reenrollments and extensions
 - Projected and actual transfers in/out and entering MSY production targets
- When the chart is updated each month, all the data entered through the end of the month being reported on are actual figures. All the data entered beyond that date are the CSO's best serious projections.
- Estimate early terminations for new placements (line 7) and for residuals (line 13). Do not just rely on actual terminations as they happen. This frees up MSYs to use and there are no surprises at the end of the fiscal year, with large unused MSYs numbers showing up at budget review time. The CSO should base these projections on past performance

in the state. To determine the early termination rate and the reenrollment rate, the CSO reviews [prior year MSY charts](#) (\\cns.gov\Data\Shared\VISTA Budget and Production\MSY Folders - ALL\MSY Archives) for the state in the CNCS Shared drive.

- In managing residuals, if a CSO begins the fiscal year, October 1, with 80 residuals on board, the CSO must have at least 80 member actions. One of the first things to do when reviewing a MSY chart is to look at residuals and add up the cumulative projected residual member actions—early terminations, closes of service, and transfers—at the end of the year. The figure cannot be less than 80; there are no exceptions. The figure can be more than 80, if a member extends and ends service in the same fiscal year; however, this occurrence is rare.

Grants and Grant Workbooks

It is important to track Grant MSYs for many of the same reasons that exist for tracking non-grant MSYs. However, tracking the current year budget is not one of them. The grant MSY charts have no direct budgetary implications because the grants have already been funded; therefore, the grant MSYs have already been “paid for.” In most cases, grant MSYs are funded in the latter months of the year, so most of the grant MSYs tracked in a given year are actually paid from the previous year’s appropriation.

The vehicle for monitoring current year funding of grants is on the cluster grant workbooks. Each cluster develops a grant workbook at the beginning of the fiscal year. The workbook is an excel chart that shows the planned grant sponsor, the total MSYs to be funded, and the dollar amount for each grant. The grant workbooks are on the CNCS shared drive in the same folder as the cluster budgets.

MSY Practice Exercise

An MSY practice exercise is available in Appendix 4A.

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Chapter 5:

Project Progress Reports

Chapter Owners: Program Impact and Operations

Effective Date: October 15, 2016

Reviewed: September, 2016

Overview of CNCS Progress Reports

As a federal agency, CNCS must ensure that federal resources are properly managed and expended in accordance with federal statutes, regulations, and guidance. We have an obligation to make sure taxpayer money is used properly and efficiently, and we must ensure program quality and provide technical assistance for VISTA sponsors.

We fulfill these responsibilities through a range of oversight and monitoring activities that we conduct throughout the life of an award, as outlined in CNCS Policy AOM-2006-002

(<http://portal.cns.gov/CNCSDepartments/DepartmentoftheChiefofProgramOperations/-OfficeofFieldLiaison/TrainingResources/ComplianceMonitoring/SupportingDocuments.aspx>) (as revised): CNCS Oversight Monitoring Activities. Some of CNCS' oversight and monitoring activities are on-site, while others are office-based. The Progress Report is an example of an office-based activity.

This VDR chapter describes the purpose and procedures related to VISTA Project Progress Reports.

VISTA Progress Report Basics

WHAT

The VISTA Project Progress Report (PPR) is an instrument used to collect information from VISTA sponsors during a project reporting period.

WHY

The PPR helps sponsors and CNCS to see whether, during a certain reporting period, sponsors are operating the project in accordance with the VISTA application, policies and regulations, and whether sponsors are making adequate progress toward achieving the results specified in their approved application.

Sponsors use the PPR to document project accomplishments, challenges, support provided by the sponsor to VISTA members, and technical assistance needs. CNCS staff members use the PPR to assess progress and to determine what feedback, technical assistance or other interventions are needed.

Information from the PPR may also be used to fulfill requests for project information from other CNCS departments, such as the Office of External Affairs.

WHO COMPLETES A PPR

The VISTA sponsor is responsible for completing and submitting the PPR to CNCS. Generally, the Project Director may oversee the process. If there are multiple sites involved, they may coordinate with site supervisors to collect certain information.

The Project Director is the individual identified on the SF-424 application. The name of this individual was entered by the sponsor applicant during the application process. The Project Director may be different from the person listed as the authorized representative or a site supervisor.

VISTAs should not complete or submit the report themselves, though they will likely assist the sponsor staff in completing the report by providing information related to their activities. Likewise, VISTA Leaders should not complete or submit the report and their eGrants access should be limited to recruitment tasks only, if at all. VISTA Leaders may be engaged in helping to coordinate information gathering from VISTA members.

WHO TYPICALLY READS AND USES PPR INFO

- The CNCS State Office that manages the project
- A sponsoring organization's Project Director, other staff, leadership, community leadership
- VISTAs serving on the project

WHO MIGHT ALSO READ AND USE INFORMATION FROM A PPR

- VISTA HQ
- Other members of the local community
- CNCS leadership
- Potential funders or sponsors
- Members of Congress and other elected officials

WHEN

The sponsor submits a PPR to the managing CNCS State Office quarterly for first-year projects and semi-annually thereafter, unless otherwise specified by the State Office.

Within 45 days of PPR submission, State Offices review the PPR, assess progress and provide feedback to the sponsor.

HOW

When sponsors completed their project application in eGrants, they identified project goals, activities, and performance measures, along with the instruments and methods they planned to use to collect data related to performance measures. Once a project is awarded, State Office staff schedule progress reports in eGrants. The information provided by the sponsor in the application serves as the basis for PPRs in eGrants.

Throughout project implementation, VISTA sponsors use their own processes to collect data that will be reported on the PPRs. This includes quantitative data for specific performance measures as well as qualitative information, such as stories, anecdotes, and descriptions of activities collected by the sponsor from individual VISTA members, community members and project staff.

The sponsor enters data and narratives for their periodic PPRs into eGrants. A hard copy PPR form is available on the CNCS website and is meant to be used as a companion to eGrants. To ensure that sponsors are prepared for their reporting obligations, State Office staff can provide new sponsors a blank copy of their next PPR from eGrants.

How a Sponsor Completes and Submits a PPR

Sponsors complete the PPR in eGrants using instructions on the screen as well as instructions found on a paper form. The companion paper form instructions are available at <http://www.nationalservice.gov/programs/amicorps/current-members/forms>.

To support the submission of quality data, all VISTA projects should be mindful of creating data collection processes that will start on the first day of a project and that satisfy the data collection protocols for any CNCS National Performance Measures that were selected. Key definitions and data collection protocols for each CNCS National Performance Measure is available at <http://www.nationalservice.gov/resources/performance-measurement/vista>.

Multi-site projects are especially affected by the need to set up an information collection process to collect data from sites. The “Working with Sub-Sites” section of the VISTA Campus provides technical assistance resources to assist multi-site projects in carrying out reporting: <http://www.vistacampus.gov/supervisors/working-sub-sites>.

THE AMERICORPS VISTA MEMBER

VISTA project sponsors are ultimately responsible for submitting PPRs in eGrants. However, sponsors can enlist (subrecipient) site supervisors and VISTA members in the process of capturing and documenting important data.

Some projects ask VISTA members to complete quarterly or bimonthly reports. The project supervisor can then use data from these reports to fulfill his or her own VISTA reporting requirements to CNCS. The member reports also can help the supervisor identify professional development opportunities for members, as well as any potential problems at the sub-sites. The VISTA Impact App, available at <http://www.vistacampus.gov/supervisors/reporting-and-evaluation>, can help sponsors and VISTA members collect data on certain activities. The VISTA Impact App does not collect all information to satisfy data collection requirements for CNCS National Performance Measures for reporting on a PPR. Sponsors should review the requirements for specific CNCS National Performance Measures (<http://www.nationalservice.gov/resources/performance-measurement/training-resources>) to determine what additional systems or information may need to be collected to satisfy data collection protocols.

Role of the CNCS State Office

The CNCS State Office schedules progress reports in eGrants, reviews the submitted report, assesses successes, progress and training/technical assistance or other needs and provides feedback accordingly. Actions may take the form of on-site supervisor training, specialized early service or in-service training, guidance on administrative procedures, or revisions to project application goals or performance measures. The State Office may require a sponsor to resubmit a poor, incomplete or erroneous progress report.

SCHEDULING DUE DATES

Once an application is awarded in eGrants, the managing State Office staff must schedule PPRs for the subsequent award period.

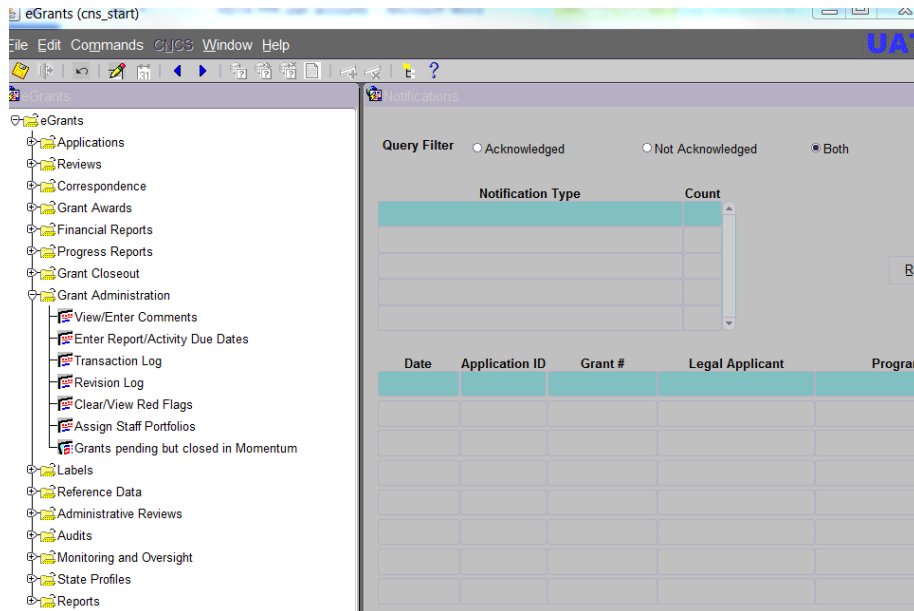
The timeline for PPR reporting periods is quarterly for first-year projects and semi-annually thereafter, unless otherwise specified by the State Office.

Sponsors should be instructed to complete PPRs regardless of whether or not a VISTA was serving during that reporting period. Sponsors may be instructed to focus their answers on narrative sections such as “recruitment” during these periods rather than other sections that may not be relevant at that point in the project lifecycle. Likewise, during reporting periods where no VISTAs were serving, State Offices should focus review and feedback on the most relevant sections of the PPR.

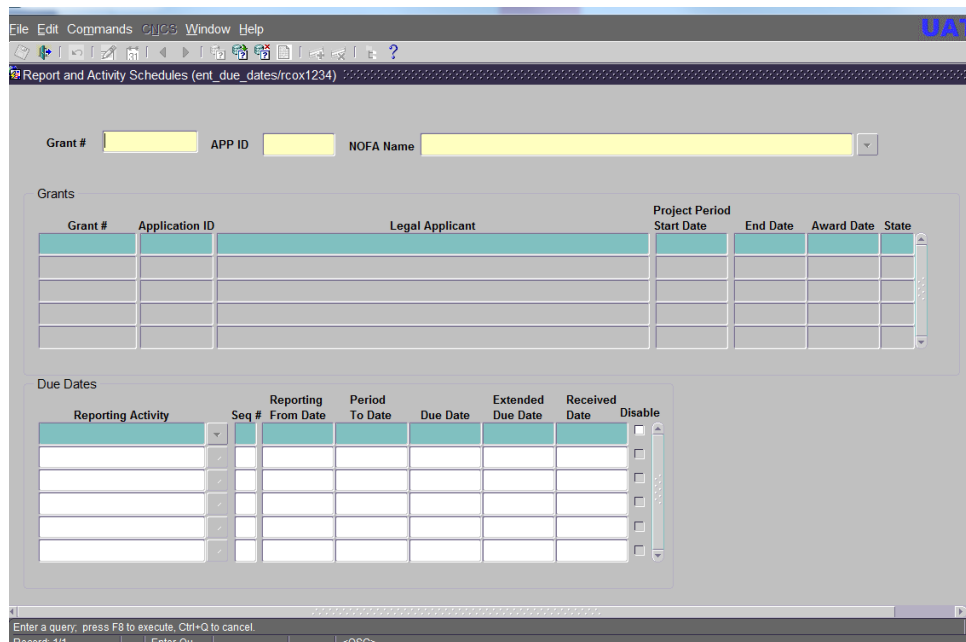
INSTRUCTIONS FOR HOW TO SET UP PROGRESS REPORT DUE DATES IN EGRANTS

eGrants does not set up VISTA Progress Reports automatically. State Office staff must set them up in eGrants Classic after an application is awarded. To set up Progress Reports, click on “Enter Report/Activity Due Dates” in the “Grant Administration Enter/Review PR” drop down list.

1. Enter the Grant Number or APP ID and press F8 to query.

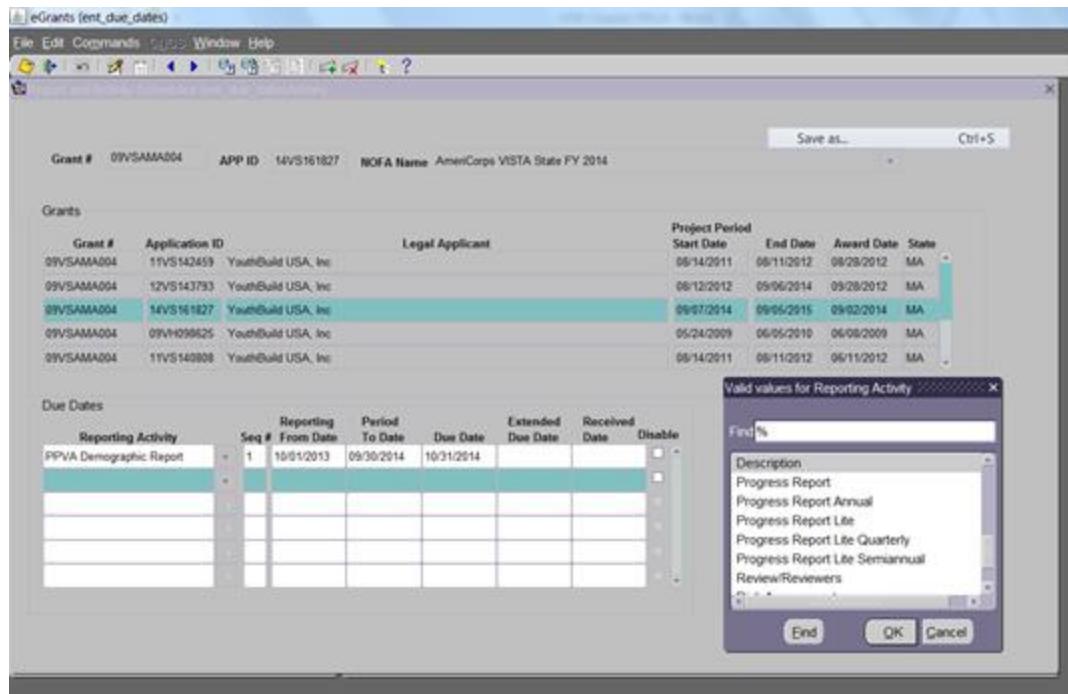


2. Scroll to the correct APP ID. Highlight a blank line under “Reporting Activity” and click the arrow to open a menu of choices.



3. Beginning with applications awarded under the FY14 NOFO, there are three types of Progress Report types available: Progress Report Lite Quarterly, Progress Report

Semiannual, and Progress Report Annual. Some reports require different information from sponsors, as shown in the table below.



The data entered in the Progress Report Lite Quarterly is intended to be cumulative from the start of the MA period, not just for that particular quarter. The first Progress Report Lite Quarterly covers the first 3 months of the project. The second Progress Report Lite Quarterly covers the first 6 months of the project year. The third Progress Report Lite Quarterly covers the first 9 months of the project year.

Report Frequency:	General Info	Member Development	Demographics	Narratives	Performance Measures	Summary
Progress Report Lite Quarterly		N/A				
Progress Report Lite Semiannual						
Progress Report Annual						

SCHEDULING REPORTS FOR THE FIRST YEAR

Projects in the first year of sponsorship must complete Progress Reports quarterly. When scheduling the report in the first year, use the following report types:

- First report—Progress Report Lite Quarterly
- Second report—Progress Report Lite Quarterly
- Third report—Progress Report Lite Quarterly
- Fourth report —Progress Report Annual

HOW TO SCHEDULE THE FIRST PROGRESS REPORT LITE QUARTERLY

Special note: The advantage of scheduling the period to date field close to the MA dates is that it more closely corresponds to the project period date, and this may make intuitive sense to sponsors and mean less dates must be tracked. Alternatively, using dates close to fiscal quarters might be advantageous for CSOs who wish to have PPRs from their entire portfolio due at the same time, rather than having to track dates for each sponsor.

1. In the “Reporting From Date” field, enter the MA start date.
2. In the “Period to Date” field (i.e., the report’s reporting period end date), enter a date one quarter (or about 90 days) from the MA start date. Alternatively, schedule the “Period to Date” as end date of the closest Federal Fiscal Quarter. (The Federal Fiscal Quarters are October 1-December 31; January 1-March 31; April 1-June 30; July 1-September 30).
3. For the “Due Date”, enter a date 30 days from the “Period to Date”.

The screenshot shows the 'eGrants (ent_due_dates)' application window. At the top, there are fields for Grant # (09VSAMA004), APP ID (14VS161827), and NOFA Name (AmeriCorps VISTA State FY 2014). Below this is a table of grants with columns for Grant #, Application ID, Legal Applicant, Project Period Start Date, End Date, Award Date, and State. The third row is highlighted in green, showing Grant # 09VSAMA004, Application ID 14VS161827, Legal Applicant YouthBuild USA, Inc, Project Period Start Date 09/07/2014, End Date 09/05/2015, Award Date 09/02/2014, and State MA. Below the grants table is a 'Due Dates' table with columns for Reporting Activity, Seq #, Reporting From Date, Period To Date, Due Date, Extended Due Date, Received Date, and Disable. The second row is highlighted in green, showing Reporting Activity Progress Report Lite Quarterly, Seq # 1, Reporting From Date 09/07/2014, Period To Date 12/07/2014, Due Date 01/07/2015, and Disable checkbox unchecked.

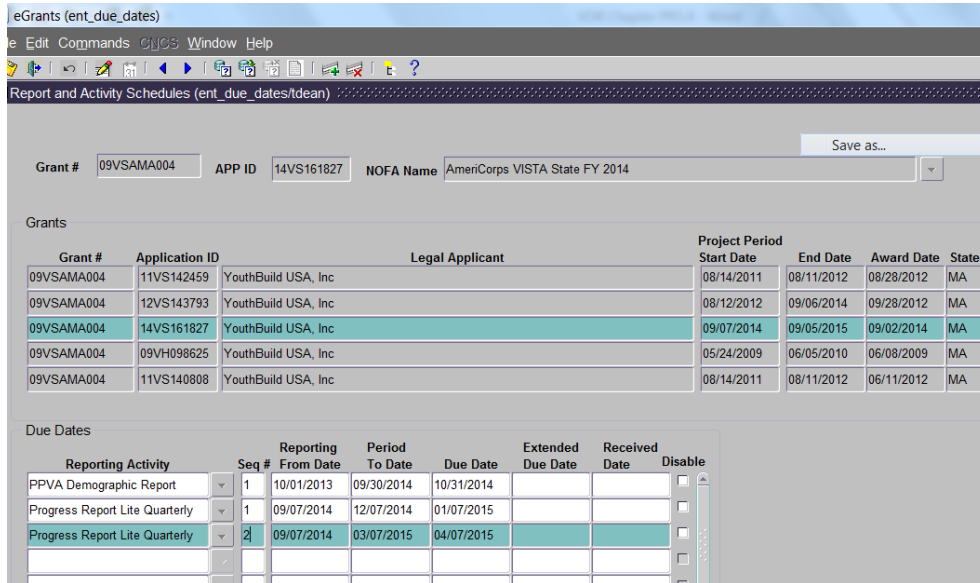
Grant #	Application ID	Legal Applicant	Project Period Start Date	End Date	Award Date	State
09VSAMA004	11VS142459	YouthBuild USA, Inc	08/14/2011	08/11/2012	08/28/2012	MA
09VSAMA004	12VS143793	YouthBuild USA, Inc	08/12/2012	09/06/2014	09/28/2012	MA
09VSAMA004	14VS161827	YouthBuild USA, Inc	09/07/2014	09/05/2015	09/02/2014	MA
09VSAMA004	09VH098625	YouthBuild USA, Inc	05/24/2009	06/05/2010	06/08/2009	MA
09VSAMA004	11VS140808	YouthBuild USA, Inc	08/14/2011	08/11/2012	06/11/2012	MA

Reporting Activity	Seq #	Reporting From Date	Period To Date	Due Date	Extended Due Date	Received Date	Disable
PPVA Demographic Report	1	10/01/2013	09/30/2014	10/31/2014			<input type="checkbox"/>
Progress Report Lite Quarterly	1	09/07/2014	12/07/2014	01/07/2015			<input type="checkbox"/>
							<input type="checkbox"/>
							<input type="checkbox"/>
							<input type="checkbox"/>

HOW TO SCHEDULE THE SECOND PROGRESS REPORT LITE QUARTERLY

1. In the “Reporting From Date” field, enter the MA start date.

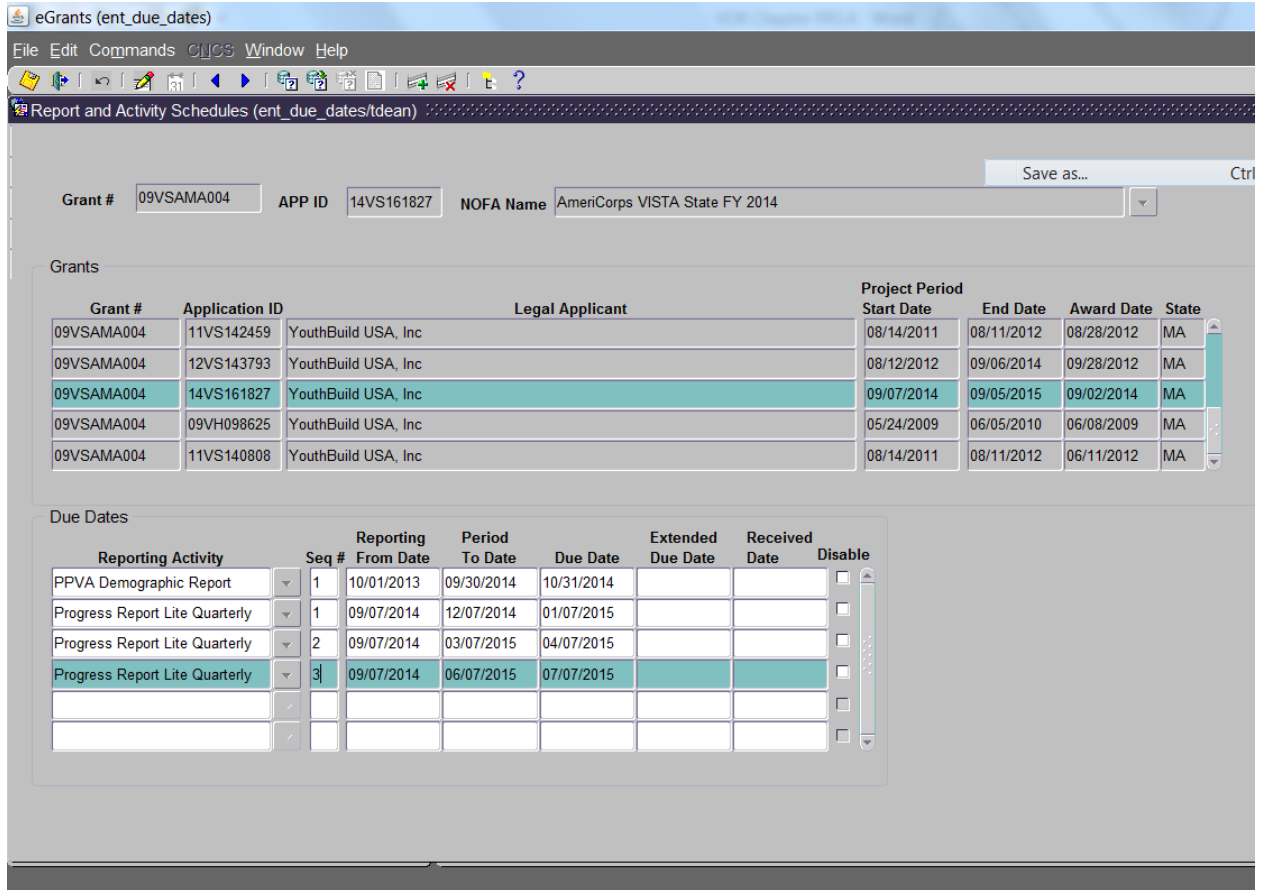
2. In the “Period to Date” field (i.e., the report’s reporting period end date), enter a date two quarters (or about 180 days) from the MA start date. Alternatively, schedule the “Period to Date” as end date of the closest Federal Fiscal Quarter that is about six months from the MA date. (The Federal Fiscal Quarters are October 1-December 31; January 1-March 31; April 1-June 30; July 1-September 30).
3. For the “Due Date”, enter a date 30 days from the “Period to Date”.
4. After adding the above information, go back and change the “Seq#” number to 2 (or the next highest number after the first Progress Report Lite Quarterly).



Change Seq# for subsequent Qtl reports in a given MA

HOW TO SCHEDULE THE THIRD PROGRESS REPORT LITE QUARTERLY

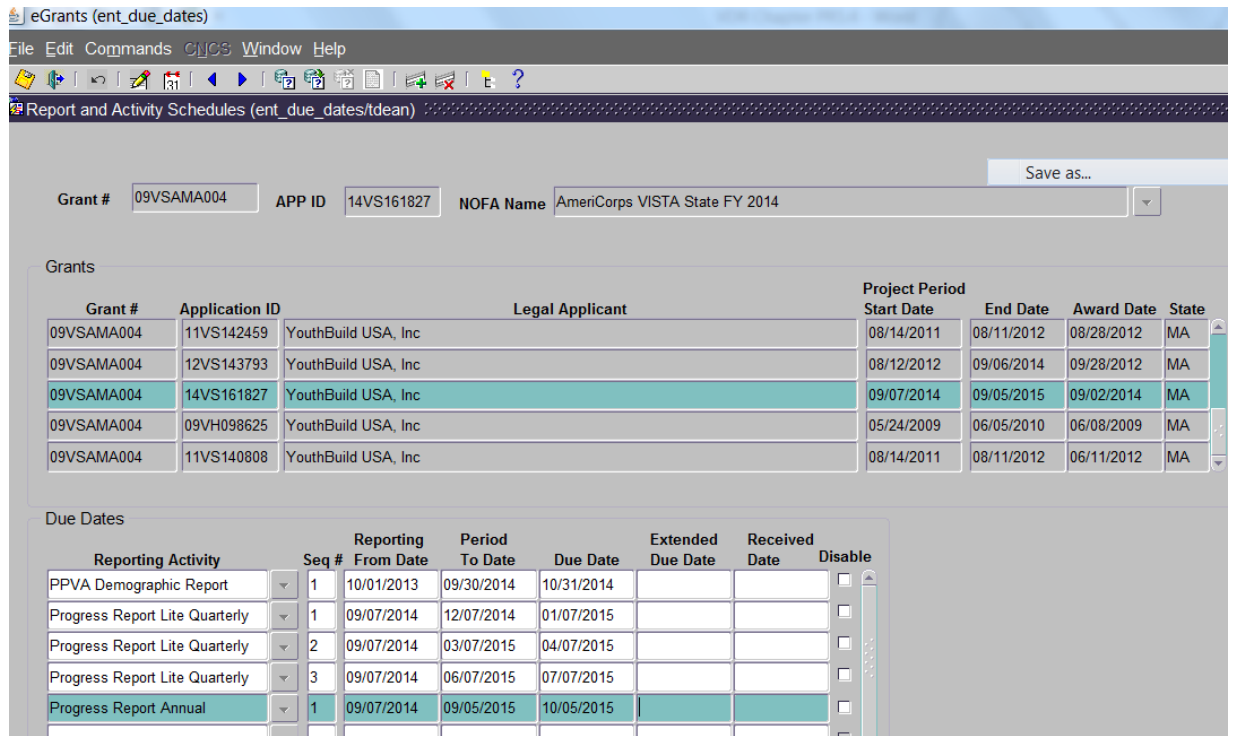
1. In the “Reporting From Date” field, enter the MA start date.
2. In the “Period to Date” field (i.e., the report’s reporting period end date), enter a date three quarters (or about 270 days) from the MA start date. Alternatively, schedule the “Period to Date” as end date of the closest Federal Fiscal Quarter that is about nine months from the MA date. (The Federal Fiscal Quarters are October 1-December 31; January 1-March 31; April 1-June 30; July 1-September 30).
3. For the “Due Date”, enter a date 30 days from the “Period to Date”.
4. After adding the above information, go back and change the “Seq#” number to 3 (or the next highest number after the second Progress Report Lite Quarterly).



Change Seq# for subsequent Qtly reports in a given MA

HOW TO SCHEDULE THE FOURTH REPORT, PROGRESS REPORT ANNUAL

1. In the “Reporting From Date” field, enter the MA start date.
2. In the “Period to Date” field, enter the MA end date, which is usually about twelve months from the start of the MA. Alternatively, schedule the “Period to Date” as the end date of the closest Federal Fiscal Quarter that is about twelve months from the MA date. (The Federal Fiscal Quarters are October 1-December 31; January 1-March 31; April 1-June 30; July 1-September 30).
3. For the “Due Date”, enter a date 30 days from the “Period to Date”.



SCHEDULING REPORTS FOR PROJECTS IN THEIR SECOND YEAR AND BEYOND

After the first year, Progress Reports are required at least twice per year, but may be requested quarterly at the discretion of the State Office. When scheduling the reports for twice a year, use the following report types:

- First report – Progress Report Lite Semiannual
- Second report – Progress Report Annual

The Progress Report Lite Semiannual covers the first six months of the project year.

1. In the “Reporting From Date” field, enter the MA start date.
2. In the “Period to Date” field (i.e., the report’s reporting period end date), enter a date two quarters (about six months) from the MA start date. Alternatively, schedule the “Period to Date” as the end date of the closest Federal Fiscal Quarter that is about two quarters (six months) from the MA date. (The Federal Fiscal Quarters are October 1-December 31; January 1-March 31; April 1-June 30; July 1-September 30).
3. For the “Due Date”, enter a date 30 days from the “Period to Date”.

The Progress Report Annual is cumulative for the project year.

1. In the “Reporting From Date” field, enter the MA start date.

2. In the “Period to Date” field, enter the MA end date, which is usually about twelve months from the start of the MA. Alternatively, schedule the “Period to Date” as the end date of the closest Federal Fiscal Quarter that is about twelve months from the MA date. (The Federal Fiscal Quarters are October 1-December 31; January 1-March 31; April 1-June 30; July 1-September 30).
3. For the “Due Date”, enter a date 30 days from the “Period to Date”.

Additional instructions for how to set up Progress Report due dates in eGrants are explained in Chapter 14 of the eGrants Staff Manual

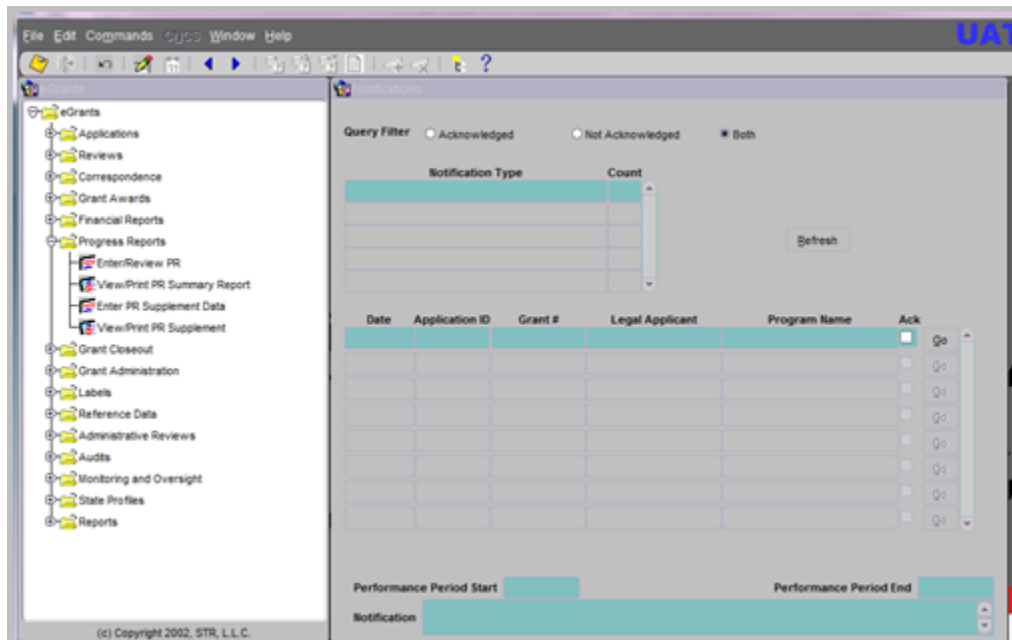
(<http://portal.cns.gov/CNCSDepartments/DepartmentoftheChiefofProgramOperations/eGrantsforStaff.aspx>).

ACCESSING THE REPORT

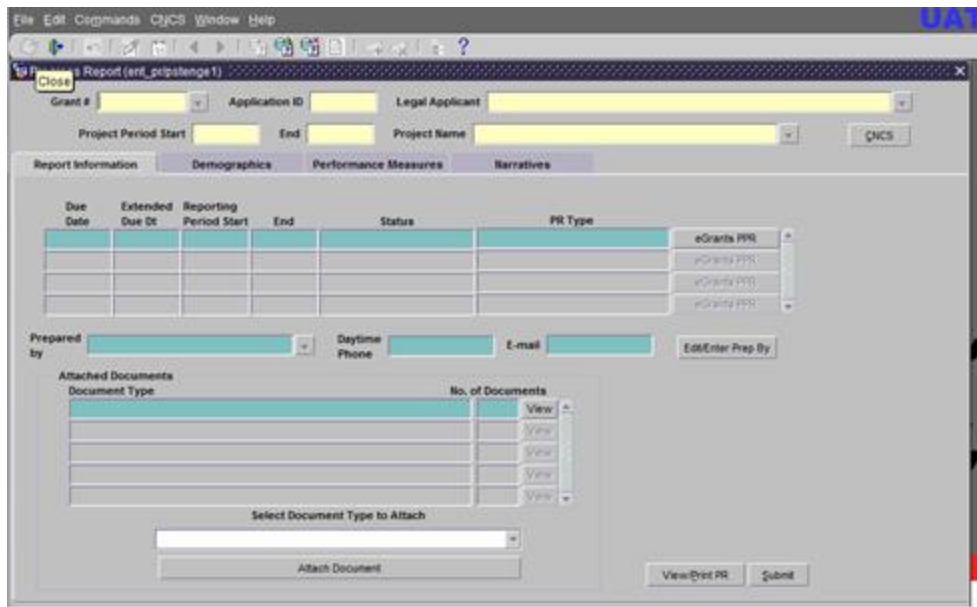
After it is scheduled, the PPR can be accessed from either eGrants Classic or eGrants Phase II.

ACCESSING THE REPORT FROM EGRANTS CLASSIC

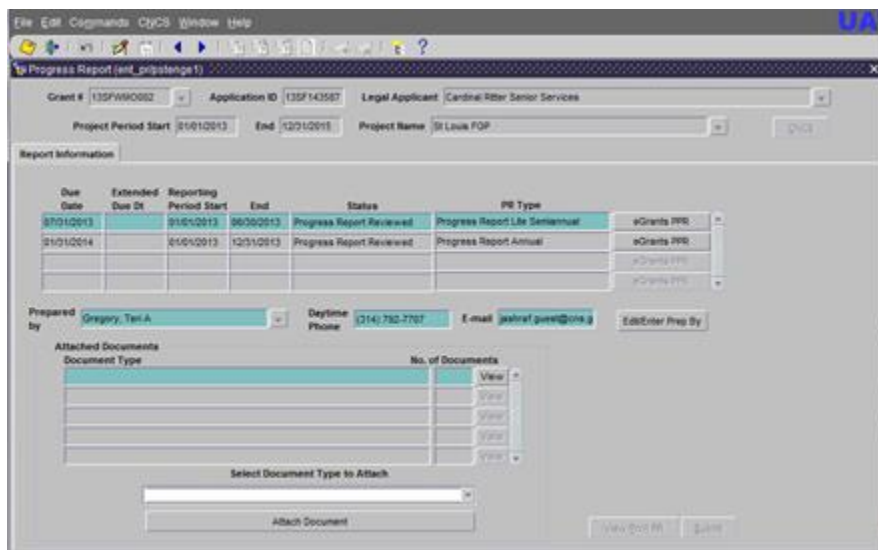
1. Click on “Enter/Review PR” in the “Progress Reports” drop down list.



2. Enter the Grant Number or App ID and press F8 to query.

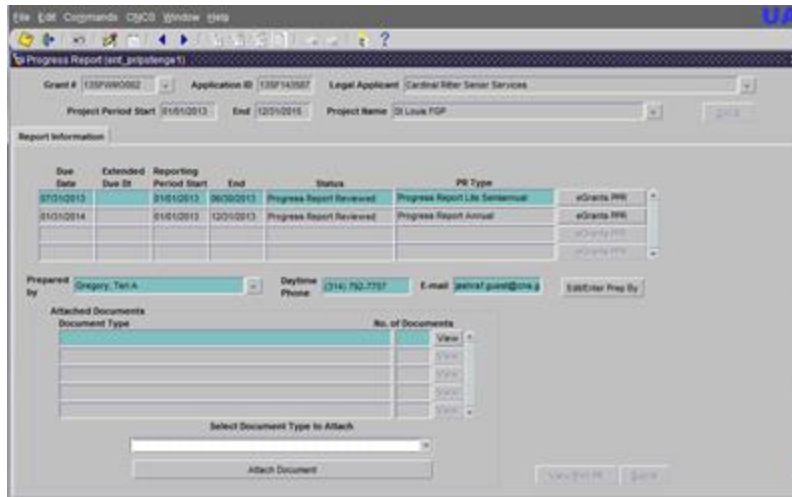


3. Use the blue arrows to find the record needed.

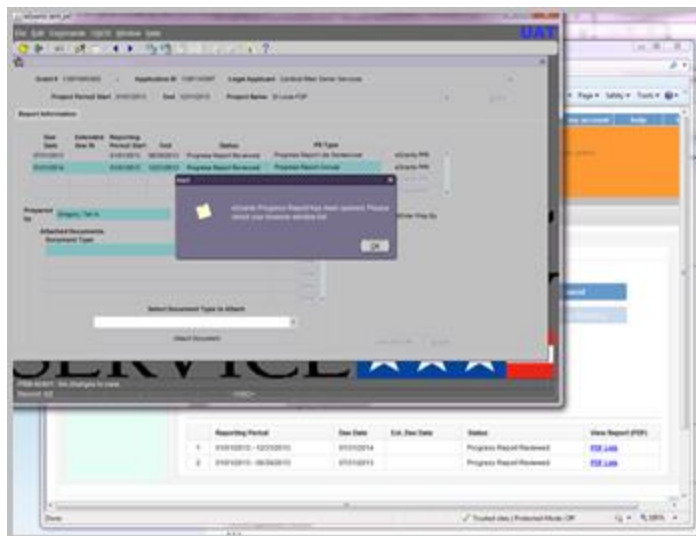


Supplemental documents sent by the sponsor organization for this PPR can be attached using the "Attach Document" feature.

4. Click on "eGrants PPR" next to the PPR to be reviewed.



5. A new window will open with the PPR to be reviewed in eGrants Phase II. Click “OK” on the small pop up and go to the new eGrants Phase II window.



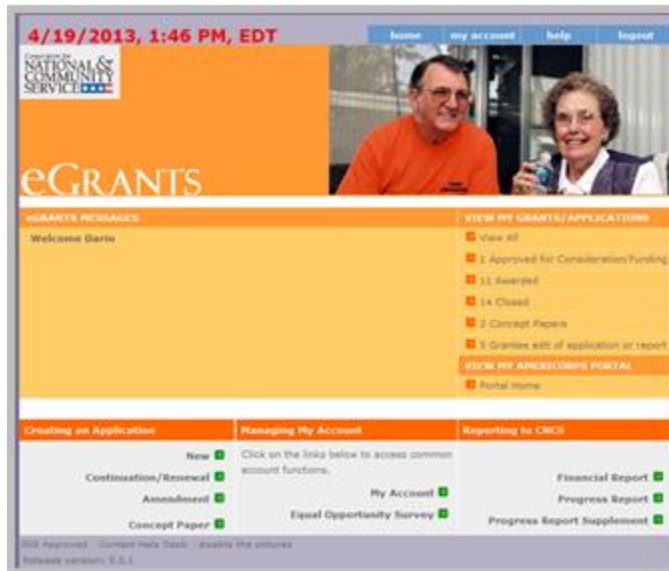
When viewing the report in eGrants Phase II, staff can edit any sponsor field. DO NOT edit any of the sponsor fields. Even if a field is edited without clicking “Save,” the new data stays in the report.

ACCESSING THE REPORT FROM EGRANTS PHASE II

1. After logging in, enter the Grant Number or APPID for the PPR to be reviewed. Click “Go.”



2. Click on "Progress Report."



3. Click on the grant number to see the Progress Reports available for that award.



4. After clicking on the grant number, a list will display of the Progress Reports available for that award. A status of “Progress Report Submitted” indicates that the report has been submitted to CNCS and is available for you to review. Click “Edit” to begin reviewing the report.

When viewing the report in eGrants Phase II, staff have the ability to change or edit any sponsor field. DO NOT edit any of the sponsor fields. Even if a field is edited and you do not click “Save,” the new data stays in the report.

REVIEWING A PROGRESS REPORT

Within 45 calendar days of sponsor submission, the State Office must review the PPR and complete appropriate sections of eGrants.

The general objective of PPR review and feedback is to promote continuous improvement of VISTA projects and project sponsors. Numerical and narrative information should be reasonably consistent with your knowledge of the project. Feedback may also address how the project is on or off track to meet performance measure targets. Feedback may also include achievements worthy of highlight, as well as problems that may need to be addressed. The PPR is an opportunity for CNCS to ensure that sponsors are meeting the obligations that were outlined in the application.

First: Check for completeness

Are there narrative fields that are not completed? Are performance measure targets not entered, without accompanying explanation?

If the PPR is not complete, you can return the PPR to the sponsor so that they can make corrections or complete it. To do this, go to the summary/staff review tab under “Staff Action,” selection “Returned for Rework,” and click “Perform Staff Action.”

Second: Does the report reflect your knowledge of the application and your experience with the sponsor’s performance, based on on-site visits or other interactions?

Are activities that were accomplished reasonably consistent with the application plan and with approved VISTA Assignment Descriptions? Are there reported inappropriate activities or indication of improper use of VISTA resources?

Third: Deeper analysis of management and performance

Are the numbers realistic? Is there a logical cause and effect between VISTA activities and reported results? Is the project on-track towards meeting project goals? If not, were there internal or external events that may have caused underperformance? Might progress be made with technical assistance? Was the unit of measurement and method of data collection appropriate? Does the sponsor show corrective knowledge regarding weaknesses?

PPR SECTIONS

The PPR is divided into several sections: Member Development, Demographics, Narratives, Performance Measures, and Summary/Staff Review. The sections in the PPR depend on which type of PPR was assigned to the project. The following pages provide information for how to review each section of the PPR.

MEMBER DEVELOPMENT

For projects using the FY14 NOFO or later, this section only appears for PPRs that are of the type Progress Report Lite Semiannually and Progress Report Annual. It does not appear for the type Progress Report Lite Quarterly.

VISTA expects sponsors to support members’ professional development. The member development section of the PPR asks sponsors to indicate the **number of hours** of member development opportunities that were provided to VISTAs, Leaders or Summer Associates during a given reporting period.

Grant Number: 09V5AMA004
 NOFA: AmeriCorps VISTA State FY 2014
 Application ID: 14V5161827
 Legal Applicant Name: YouthBuild USA, Inc

eGRANTS Progress Report

General Info | **Member Development** | Demographics | Narratives | Performance Measures | Summary/Staff Review

VISTA PPR Member Development Information

	Member Development Information	Hours
1	On-Site Orientation	0
2	Community Outreach	0
3	Community Volunteer Generation/Recruitment	0
4	Effective Volunteer Management	0
5	Resource Mapping	0
6	Resource Development/Fundraising	0
7	Grant Writing	0
8	Organizational Development	0
9	Performance Measures	0
10	Tracking Systems	0
11	Information Technology	0
12	Developing On-Site Orientations and Training Plans	0
13	Other (Please Specify)	0

Sponsor Note
 Staff Note
[Note History](#)

Done With Section

For example, consider a sponsor is completing a Progress Report Annual that covers a twelve month reporting period. If a VISTA attended a one-hour grant writing workshop in the first six months of the reporting period, and the same VISTA plus a new VISTA attended a two-hour grant writing workshop in the second six months of the reporting period, the sponsor would enter “5” in the field for “Grant Writing” to reflect the total of five hours (1 hour x 1 VISTA + 2 hours x 2 VISTAs) provided during the twelve month reporting period.

When reviewing this section, State Offices should consider:

Is the information complete?

Sponsors should have checked the “Done With Section” box to indicate that they have completed this section.

Are the numbers realistic?

Do member development opportunities reported appear reasonably consistent with what you expect based on the application plan and with approved VISTA Assignment Descriptions?

Is the sponsor providing adequate member development opportunities?

“Adequate” is a judgment call, but sponsors should at least provide opportunities based on what they committed to in the approved application. Does the sponsor have high member attrition? Are

you aware of reports of negative experience by members? Do you feel the sponsor is not making programmatic progress? Answering yes to these types of questions may be an indication that the sponsor is not providing adequate support via member development opportunities, and may be an area for you to follow up with them about.

Review any comments the sponsor recorded in the “Sponsor Note” box. If they have any professional development data for the “Other” category, they should have described this in the Sponsor Note box.

If you have feedback for the sponsor on the member development section, add it to the “Staff Note” box. Any information you enter into the “Staff Note” box on the member development tab is visible to the sponsor.

Click “Save.” Click “Next” to move to the next screen.

DEMOGRAPHICS

This section asks sponsors to provide data for their project on various standard questions:

- # of community volunteers recruited as a result of the VISTA project during the reporting period
- # of community volunteers managed as a result of the VISTA project during the reporting period
- # of hours of service contributed during the reporting period by the community volunteers who were recruited as a result of the VISTA project
- # of hours of service contributed during the reporting period by the community volunteers who were managed as a result of the VISTA project
- Dollar value of cash resources leveraged as a result of the VISTA project during the reporting period
- Dollar value of in-kind resources leveraged as a result of the VISTA project during the reporting period

VISTA PPR Demographics information

This section contains a list of Demographic indicators of interest to the Corporation and our stakeholders. Please provide cumulative totals.

Demographic Information	Value
1 # of community volunteers recruited during the reporting period	<input type="text" value="0"/>
2 # of community volunteers managed during the reporting period	<input type="text" value="0"/>
3 # of Service Hours performed by Community Volunteers who were recruited	<input type="text" value="0"/>
4 # of Service Hours performed by Community Volunteers who were managed	<input type="text" value="0"/>
5 Dollar value of cash resources leveraged during the reporting period	<input type="text" value="0"/>
6 Dollar value of in-kind resources leveraged during the reporting period	<input type="text" value="0"/>

Sponsor Note

Staff Note

[Note History](#)

Not all of these updates will be relevant for all sponsors. For instance, if a VISTA project is not engaged in recruiting volunteers, the sponsor would answer “0” for that measure.

Review any comments the sponsor recorded in the “Sponsor Note” box.

If you have feedback for the sponsor on the demographics section, add it to the “Staff Note” box. Any information you enter into the “Staff Note” box on the member development tab is visible to the sponsor.

Click “Save.” Click “Next” to move to the next screen.

NARRATIVES

In this section, a sponsor describes challenges, training/technical assistance needs, and other accomplishments not covered under the previous sections. This section also asks for a description of partnerships and collaborations, as well as the efforts made to move the project towards sustainability.

The narratives in the PPR are an opportunity to provide sponsors with feedback for continual improvement. CNCS staff members are expected to review PPR narratives for descriptions of best practices and illustrations of program quality, as well as inappropriate activities that may require sponsors to make corrective actions.

Click on each narrative heading to see the text field where the sponsor has entered narrative information.

The screenshot displays the 'eGRANTS Progress Report' interface. At the top, the title 'eGRANTS Progress Report' is visible, along with the legal applicant name 'Baylor University'. Below the title is a navigation bar with tabs for 'General Info', 'Member Development', 'Demographics', 'Narratives', 'Performance Measures', and 'Summary/Staff Review'. The 'Narratives' tab is currently selected. On the left, there is a 'Screen Instructions' box with a placeholder for instructions. The main content area is titled 'VISTA PPR Narratives' and includes a brief instruction: 'In this section, open each panel that you would like to utilize and describe your activities during the reporting period in more detail.' Below this instruction are two status indicators: a green square for 'Narrative entered' and an orange square for 'Narrative not entered'. A list of narrative categories is shown, each with a corresponding status indicator: Challenges, Recruitment, Training/Technical Assistance Needs, Partnership/Collaboration Development, Resource Development, Sustainability, Multi-Site Performance, Other Accomplishments, Stories, and Attachments and Links. On the right side of the interface, there are two text input fields labeled 'Sponsor Note' and 'Staff Note', and a 'Note History' link below them.

Challenges

In the Challenges narrative, the sponsor should describe the challenges they encountered during this reporting period, as well as whether challenges have been resolved or plans to address unresolved challenges remain.

Recruitment and Support

In the Recruitment and Support narrative, the sponsor should describe efforts being made toward recruitment and support of AmeriCorps VISTA members, including any strategies implemented, best practices developed, or specific challenges faced. Sponsors should describe their plan to ensure a smooth transition between outgoing and incoming AmeriCorps VISTA members.

Training/Technical Assistance Needs

In the Training/Technical Assistance Needs narrative, the sponsor should describe the type of assistance they would like from CNCS, including requests to make revisions to the currently awarded project application.

Partnership/Collaboration Development

In the Partnership/Collaboration Development narrative, the sponsor should list the CNCS or non-CNCS programs or organizations with which their AmeriCorps VISTA project is partnering or collaborating that are intended to further the activities and goals of the VISTA project. Sponsors should describe the nature of the partnership or collaboration and how they relate to the project goals, along with notable activities and results.

Resource Development

In the Resource Development narrative, the sponsor should describe the resources that they recorded on the Demographics tab of this PPR. Sponsors should describe the strategies to recruit and/or manage community volunteers as well as the nature of their activities, as well as the source and the use of the cash or in-kind resources generated by the VISTA project. The sponsor should identify the AmeriCorps VISTA member(s) responsible for developing the resource.

Sustainability

In the Sustainability narrative, the sponsor should describe specific strategies that are in place to sustain the results of the VISTA project. Sponsors should describe their plan and progress toward transitioning their project away from AmeriCorps VISTA resources.

For the final report of the current program year, sponsors should include a summary describing project accomplishments and results during the life of the project that will remain in the community upon completion of the project. They should describe how local community members and project beneficiaries are involved in the implementation of the project. If this is the final progress report for the

entire project, sponsors should describe the project accomplishments and results and how they will continue after VISTA resources are gone.

Multi-Site Program Management and Performance

If a sponsor has AmeriCorps VISTA members placed at multiple sites, in the Multi-Site Program Management and Performance narrative, they should describe how they managed and monitored project performance at the sites during the reporting period. Sponsors should describe how they managed the addition of new sites, including activities during the reporting period for orienting and training site supervisors. Sponsors should identify any challenges with site performance and management and technical assistance they plan to provide to sites. They should describe their process for ensuring sites report any unscheduled member departures or terminations.

Other Accomplishments

In the Other Accomplishments narrative, the sponsor should describe any additional project or member accomplishments that are not reported within the performance measures (next tab), including any awards received.

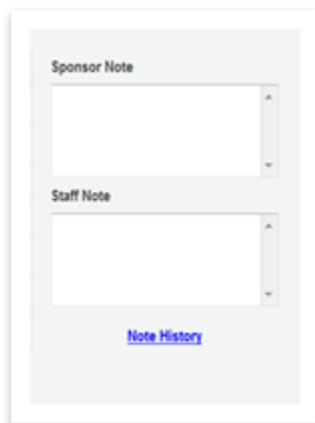
Stories

In the Stories narrative, the sponsor should provide stories that communicate to the public the value of AmeriCorps VISTA members to their organization and community.

Attachments and Links

In the Attachments and Links narrative, the sponsor should list any additional documents mailed or emailed to the State Office as part of this PPR submission. Examples include copies of press clippings, flyers, letters or other documents that relate to the VISTA project or members' activities and accomplishments. Note: eGrants does not have an upload or attach feature so they are simply listing the additional documents they will or have already sent to the CNCS State Office to supplement this report.

Review any comments the sponsor recorded in the "Sponsor Note" box.



If you have feedback for the sponsor on the Narrative section, add it to the “Staff Note” box. Any information you enter into the “Staff Note” box on the member development tab is visible to the sponsor.

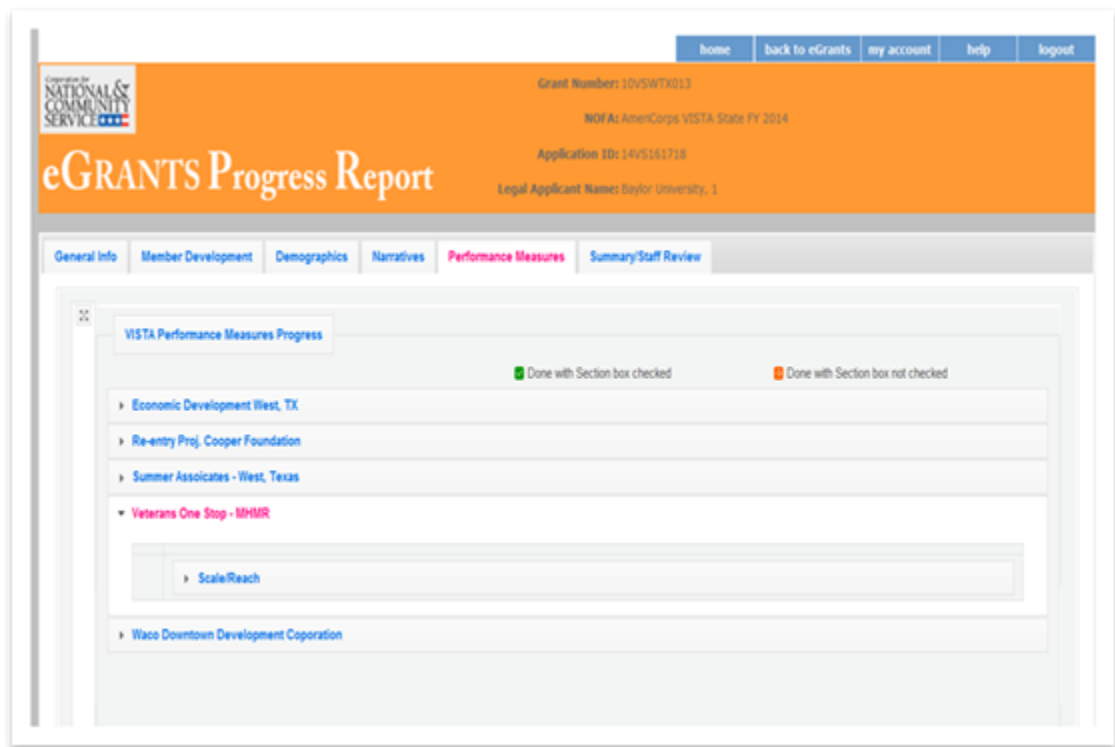
Click “Save.” Click “Next” to move to the next screen.

PERFORMANCE MEASURES

This section is customized for each sponsor in eGrants based on the performance measures identified in the most recently awarded project application or amendment. The sponsor enters actual data against the targets set in the awarded application for the project.

The Performance Measure information is organized by site and capacity goal. CSO staff review the information entered for each performance measure set.

1. Click on the small arrows to open that performance measure and see the report on progress.



When the performance measure set is open, you will see a number of columns. Moving your mouse over the items in the Measure # column will show the description of the measure.

2. In the ‘Actual’ column, you will see numbers that the sponsor entered for the reporting period.

PM1 - Capacity Building & Leverage - Full Time VISTA - Year 2

Capacity Building Performance Measures				
Measure Type	Measure #	Target	Actual	Progress
Output	G3-3.4	10	10	100.00 %
Output	G3-3.5	200	159	79.50 %
Outcome	G3-3.16	900000	876514	97.39 %
Outcome	G3-3.17	1000	1113	111.30 %
# of Full time VISTAS		1	1	100.00 %

Staff Rating

Staff Note

Mapped Focus Area Measures						
PM ID	Focus Area	Measure Type	Measure #	Target	Actual	Progress
2	Economic Opportunity - Employment	Anti-Poverty Output	O2	100	0	0.00 %
		Anti-Poverty Outcome	OUTCM13392	50	0	0.00 %
		# of Full time VISTAS		1	1	0.00 %

[Note History](#)

Sponsor Note: Joe Vista started his service with us one month into this reporting period. He has done an excellent job training staff and community volunteers on our new financial literacy TOT curriculum.

- Sponsors must report “Actuals” for Capacity Building Performance Measures.
 - Reporting “Actuals” for Anti-Poverty Measures (i.e., those under the “Mapped Focus Area Measures” label) is not required for projects doing capacity building.
 - The only scenario when reporting “Actuals” for Anti-Poverty Measures is required is if performance measures are for Summer Associates doing Direct Service.
3. Review any comments the sponsor recorded in the “Sponsor Note” box.

Sponsor Note: Joe Vista started his service with us one month into this reporting period. He has done an excellent job training staff and community volunteers on our new financial literacy TOT curriculum.

In this box, a sponsor is reporting with a narrative on the particular performance measure that is listed. If targets are not on track to be achieved, sponsors should provide an explanation. For example, a sponsor might provide additional detail about their activity or they might note that the reason they were unable to reach a performance measure target was because MSY resources were not available for them to place a VISTA in the timeframe originally envisioned.

4. Select a “Staff Rating” for each performance measure set.

PM1 - Capacity Building & Leverage - Full Time VISTA - Year 2

Capacity Building Performance Measures				
Measure Type	Measure #	Target	Actual	Progress
Output	G3-3.4	10	10	100.00 %
Output	G3-3.5	200	159	79.50 %
Outcome	G3-3.16	900000	876514	97.39 %
Outcome	G3-3.17	1000	1113	111.30 %
# of Full time VISTAS		1	1	100.00 %

Mapped Focus Area Measures						
PM ID	Focus Area	Measure Type	Measure #	Target	Actual	Progress
2	Economic Opportunity - Employment	Anti-Poverty Output	O2	100	0	0.00 %
		Anti-Poverty Outcome	OUTCM13392	50	0	0.00 %

Staff Rating: On Track, Needs Work, Complete

[Note History](#)

A rating of “On Track” means that the sponsor is on track to meet the targets by the end of the current project period (for VISTA, a project period is about a year). A rating of “Needs Work” means that CSO staff have reason to think some of the targets may not be met by the end of the project period. A status of “Complete” is used if the targets were achieved during the project period.

A note about capacity building and quantitative metrics.

Due to the complex nature of capacity building activities, in some cases it may be difficult to determine whether a sponsor is “On Track” or “Needs Work” during a particular reporting period using only performance measure data.

For example, say that in their application, a sponsor selected outcome G3-3-3.16, Dollar value of cash resources leveraged by CNCS-supported organizations or national service participants during the application, and they set a target of \$900,000 by the end of the project period (for VISTA, a project period is usually about one year).

If you are reviewing a report for the first six months of the project and they report \$0 raised in the Actual column, would you rate them as “On Track” or “Needs Work” for that PPR submission?

It may be difficult to determine just by looking at what is reported in the “Actual” column. Perhaps the full targeted amount will come in a lump sum in the final month of the project, after they are approved for a grant based on a proposal that the VISTA member helped put together and submit eight months prior.

In this case, you might rate them as “On Track” for the PPR if you learn from other information (like in the “Sponsor Note” narrative) that the VISTA members and sponsor have been actively fundraising. On the other hand, you might say that they “Need Work” if you believe that the VISTA

member or sponsor are not engaging in activities that will have a likelihood of success and are in need of technical assistance.

In short, you may need to use non-performance measure information, as well as professional judgment, in selecting a rating for the performance measures.

A staff note can be entered in the text box below the status. If “Needs Work” is selected, enter a note explaining what steps the sponsor should take. If the sponsor has entered something incorrectly in the performance measures, note it in this section. If the data reported does not appear to accurately measure the performance measure outputs or outcomes, enter a comment. If the data collection has varied from the plan originally described in the instrument description field, enter a comment. Any staff notes entered will become part of the note history for the PPR and will be visible to the sponsor.

When you have reviewed all performance measure sets, and selected either “On Track” or “Needs Work,” click “Save.” Click “Next” to move to the next screen.

SUMMARY/STAFF REVIEW

The Summary/Staff Review Tab provides a summary of the PPR. From this screen, you can print the PPR Summary, review the project’s progress, enter notes to the sponsor, and review comments that the sponsor provided to you.

Grant Number: 10VSWTX013
 NOFA: AmeriCorps VISTA State FY 2014
 Application ID: 14VS161718
 Legal Applicant Name: Baylor University, 1

General Info | Member Development | Demographics | Narratives | Performance Measures | **Summary/Staff Review**

Print PPR Summary | Print Complete Note History
 Veterans One Stop - MHMR | Print PPR Report by Site

Measure	Site	Target	Actual
G3-3.13	Waco Downtown Development Coporation	9	0
G3-3.13	Veterans One Stop - MHMR	6	0
G3-3.13	Re-entry Proj; Cooper Foundation	6	0
G3-3.13	Summer Associates - West, Texas	4	0
G3-3.13	Economic Development West, TX	12	0
	Total:	37	0
G3-3.19	Waco Downtown Development Coporation	150	0
G3-3.19	Veterans One Stop - MHMR	300	0
G3-3.19	Re-entry Proj; Cooper Foundation	100	0
	Total:	550	0
G3-3.4	Waco Downtown Development Coporation	10	0
G3-3.4	Summer Associates - West, Texas	4	0

1. Use the Overall Staff Note box to enter any additional information you would like to provide the sponsor.

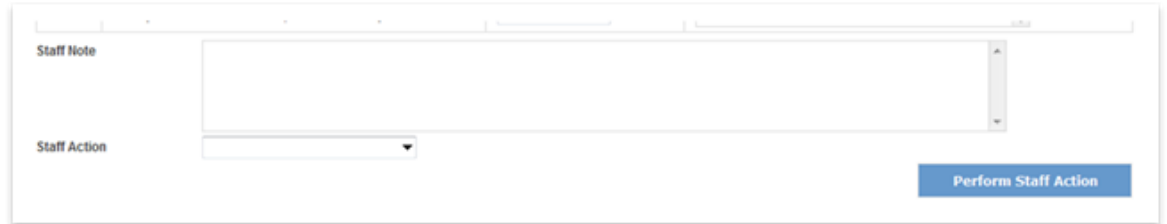
2. Toward the bottom of the screen, the Staff Review Section appears. It is only visible to CNCS staff. With the exception of the Staff Action selected, any information entered here will not be viewable by the sponsor.

	Monitoring Information	Review	Comments
1	Is the progress report missing required information and/or contain in accurate information?	<input type="text"/>	<input type="text"/>
2	Have there been any key staffing changes and/or vacancies at the award recipient level?	<input type="text"/>	<input type="text"/>
3	Is there concern and/or evidence that the recipient has not made or reported reasonable progress?	<input type="text"/>	<input type="text"/>
4	Has an instance or potential instance of prohibited activity been identified?	<input type="text"/>	<input type="text"/>
5	Have you been informed of a prohibited activity?	<input type="text"/>	<input type="text"/>

3. Select a review status for each of the Monitoring Information questions. If 'Yes' is selected for any question, a comment must be entered. Comments entered in this section will automatically populate into the corresponding comment sections in the Monitoring Assessment Module of eGrants. 'Yes' responses for question 2 will populate as 'Yes' determinations in the corresponding Monitoring Assessment Module criteria. (Questions in this section are related to CNCS-wide guidance.)
 - Question 1 should be answered based on the PPR as it was originally submitted
 - Question 2 should be answered based on the PPR as well as information known to you outside of the PPR.
 - Questions 4 and 5 both relate to prohibited activities. Both questions should be answered based on the PPR as well as any other relevant information known to you outside of the PPR. Refer to the Criteria Descriptions CNCS-Wide Monitoring Planning Assessments for information about prohibited activities.
 - If you select 'Yes' for Question 4 and/or Question 5, you must immediately inform the SPD and Area Manager. You should not wait to complete the full Progress Report

review before taking action on any possible prohibited activities. The Area Manager should report this information to VISTA HQ. Maintain documentation of the prohibited activity or activities, any actions that have been taken to follow up on the issue, and documentation on resolution if any.

- Enter any additional Staff Note as needed. The note will not be visible to the sponsor.
4. Select “Mark as Reviewed” or “Returned for Rework” from the Staff Action drop down list.

A screenshot of a web form interface. It features a large text input field labeled "Staff Note" and a dropdown menu labeled "Staff Action". A blue button labeled "Perform Staff Action" is located at the bottom right of the form.

5. Selecting “Mark as Reviewed” will allow the sponsor to view all ratings selected and all notes that have been entered. Selecting “Returned for Rework” will allow the sponsor to view all notes, but ratings will not be viewable. This will allow the sponsor to make the necessary corrections to the PPR without being influenced by a rating. A PPR will need to be returned for rework if it is incomplete or includes incorrect information. The Program Officer (PO) should indicate when they expect the sponsor to submit their reworked PPR. The amount of time that the PO provides will vary based on the degree of rework needed.
6. Click “Perform Staff Action.” This triggers an automatic e-mail to be sent to the sponsor indicating the status of the PPR and prompting them to login to eGrants to review or make changes.

Role of VISTA HQ

VISTA headquarters may review PPRs to draft specialty area portfolio reviews, to discover anecdotes and highlights for external audiences, to plan for special multi-state initiatives, or to gain familiarity with specific projects or sponsors.

For instance, a headquarters Program Specialist may be called upon to research VISTA’s current portfolio of mentoring projects in American Indian/Alaskan Native communities during the establishment of a potential multi-state collaboration. Whenever practicable, VISTA headquarters seeks the assistance of OFL staff in understanding project background and history.

Due Dates, Extending the Deadline, and Late Reports

Sponsors are required to submit PPRs at prescribed intervals. Generally, reports are due 30 days after the end of a reporting period. CNCS has a series of consequences if the sponsor misses PPR due dates

(see below). State Office staff should highlight these policies in order to stress to sponsors the importance of timely reporting and to address late report submissions.

Extending the deadline for submitting a Progress Reports

There are a number of extenuating circumstances which may cause a sponsor to be unable to meet an originally established due date for a PPR. In such cases, the State Office may extend PPR deadlines for sponsors. Examples of extenuating circumstances to extend the due date are eGrants outages and natural disasters.

The due date can be extended in eGrants and instructions can be found in Chapter 14 of the eGrants Staff Manual

(<http://portal.cns.gov/CNCSDepartments/DepartmentoftheChiefofProgramOperations/eGrantsforStaff.aspx>). As long as the sponsor submits a completed PPR by the newly established due date, it is not considered late.

Late Progress Reports

A Progress Report is considered late if the sponsor has not submitted it by the established due date. The VISTA program follows CNCS policy AOM-2007-01 (as revised)

(<http://portal.cns.gov/CNCSDepartments/DepartmentoftheChiefOperatingOfficer/-OfficeofAwardOversightMonitoringAOM/MonitoringPolicies.aspx>): Holds on Award Funds for Significantly Late Program Progress and Financial Report Submissions. Please review the policy for implications to VISTA sponsors.

Also, visit the Award Oversight and Monitoring intranet site

(<http://portal.cns.gov/CNCSDepartments/DepartmentoftheChiefOperatingOfficer/-OfficeofAwardOversightMonitoringAOM/TimelyReportingManualHolds.aspx>) for an overview of current CNCS measures intended to facilitate timely reporting and address late reporting, including automatically generated eGrants notifications regarding reporting deadlines.

Chapter 6:

Outreach to Potential Sponsors

Chapter Owners: Program Impact and Operations, and Marketing, Outreach, and Recruitment

Effective Date: October 15, 2016

Reviewed: September, 2016

Overview

Given that a VISTA project's duration is generally three years, new project outreach and development is an on-going activity in every CNCS State Office. As of the beginning of September, 2016, new projects make up 24% of the national portfolio.

Year	% of New Projects
2016	24%
2015	21%
2014	18%
2013	15%
2012	8%
2011	4%
2010	3%
2009	2%
2008	1%
2007	1%
2006	2%

Assessing the State's Current Portfolio

- Where are existing projects?
- What is the age of existing projects?
- What type of organizations are project sponsors?
- What is the breakout between service categories or priority areas?

Unfortunately, CNCS does not have mapping software so the process of determining “where” your current projects are located is best handled manually. One method is to plot projects geographically. Obtain a map of the state and a box of map pins. Use the project and site lists from the staff portal and stick pins in the map to indicate the location of existing projects. Use different colors to indicate the size of the projects or types of projects. Another option is to use a free online mapping tool (e.g., Google Maps via <https://www.google.com/maps>), and create your own map using the same principles.

Again, using a list of current projects generated from the Staff Portal, determine the age of existing projects. Does the state follow the average and turn over new projects consistently, or has there not been a new project developed in over a year or two?

Are project sponsors all large intermediary sponsors? Alternatively, are they small non-profits? Are there local government or state government sponsors? There is no right or wrong ratio of one sponsor type versus another, but the goal is to have a mix of sponsor types and allow broad participation of sponsors.

The goal of having a mix applies also to service categories and priority areas. When new priority areas are announced in the annual VISTA Program Guidance, it is not expected that every new project falls within those areas and that existing projects whose work is not in the priority areas be closed to make way for new ones. What is expected is that each CSO actively attempts to include new priority area projects in its portfolio when a need exists in the state, and that a “snap-shot” view of a state’s portfolio shows a balance of new and old projects in nationally identified and locally identified priority areas.

Below is a sample portfolio of current projects worksheet.

AGE:

0-1 years	0
1-2 years	0
2-3 years	0
3-4 years	0
4-5 years	0
5-7 years	0
7-10 years	0
10 years or older	0

TYPES:

Small nonprofit	0
Medium nonprofit	0
Large nonprofit	0
Local government agency	0
State government agency	0
Federal government agency	0
Single site projects	0
Intermediaries	0
Rural	0
Urban	0

PROGRAMMING AREAS (2017):

HQ-Identified Priority Areas and Focus Areas	
Opportunity Youth	0
Rural Community Development	0
Tribal Community Development	0
New Americans/Refugee Integration	0
Economic Opportunity	0
Education	0
Health	0
Veterans and Military Families	0
State-Identified Needs of Low-Income Communities	
	0
	0
	0
	0
	0
	0
	0

Planning for New Development

- Where is the poverty in the state, based on the latest statistics?
- What are the needs of low-income communities in the state?
- What is missing from the state’s portfolio?

One can find poverty statistics using the U.S. Census Poverty Home Page located at <http://www.census.gov/hhes/www/poverty/poverty.html>. A state may also have its own Web site with statistics on poverty and other indicators.

Looking at the map of current projects, find the counties with the highest poverty rates. Are there projects in those counties? Are projects spread throughout the state or are they concentrated around the capital and major towns?

Generally, the priority areas given in VISTA’s annual guidance are broad enough to encompass most local needs. However, communities may identify issue areas that do not fall into one of the priority areas. The goal of a balanced portfolio is to have projects that address local needs and the priority areas and/or strategic initiatives in some manner, and are distributed throughout the state’s low-income communities.

Based on a review of the portfolio worksheet, or other similar documents, determine where there are few or no projects in any given priority area, and which of those areas are most relevant to the needs of the state.

Tips for Finding New Project Sponsors

- Ask colleagues
- Conduct a Request for Concept Paper (RFCP) process
- Have your intermediary sponsor(s) conduct a Request for Proposals (RFP) (sponsors may use the term RFP which CNCS may not in regards to AmeriCorps VISTA)

HOW DO COLLEAGUES FIND NEW PROJECT SPONSORS?

Leroy Minor (formerly in the Texas CSO) offers:

“Elevator speeches and passing out my (CNCS purchased) business card. I take any opportunity where I have an audience and I believe they could benefit from the resource. I recently spoke at an RSVP recognition and met several representatives who worked for the city; we have meetings set up to speak more about VISTA.

I am scheduling several longer presentations, where I will cover the waterfront: from who we are (CNCS), to this is AmeriCorps VISTA and this is how you apply; step-by-step. To ensure adequate participation, I schedule through organizations that have the farthest reach, i.e., Councils of Government, United Ways, and local foundations.

I have also sent articles to state-wide and regional organizations to include in their newsletters; the article is written like an RFCP, indicating that we are looking for organizations to sponsor AmeriCorps VISTA projects in their area; if interested please contact our office.”

Amy Dailey and Teresa O’Halloran (Portland, OR) offer:

“By starting a project with a strong CAP agency in the southern part of the state and letting them do a local RFCP, we’ve been able to reach out to a decent number of small agencies that we’ve never worked with before.

Other ideas include:

- Using your CNCS social media accounts to advertise opportunities for new project development;
- Reach out to your [State Association of Nonprofits](https://www.councilofnonprofits.org/find-your-state-association) (<https://www.councilofnonprofits.org/find-your-state-association>)
- Review the site lists of your intermediary projects to see if any may be suitable for their own project sponsorship because of their own geographic reach
- Occasionally review eGrants for Concept Papers that are in Grantee Initial Entry and if any seem to fit with your portfolio needs, reach out to the organization

Request to CSOs: Please submit additional ideas for outreach to potential sponsors to vdr@cns.gov. In the subject line, enter “Outreach.”

CONDUCTING A REQUEST FOR CONCEPT PAPER PROCESS

To maximize both time and effort, some CSOs run a Request for Concept Paper (RFCP) process. Intermediary sponsors are able to run a Request for Proposal (RFP), not an RFCP. With the introduction of eGrants, the potential of receiving more than enough Concept Paper submissions exists. By publishing an RFCP and clearly indicating the types of projects eligible for consideration, the chances of getting concept papers that fall under identified priority or geographical areas of need increase dramatically.

Unlike a traditional NOFA (Notice of Funds Availability) published in the Federal Register, which is a competitive process VISTA normally reserves for Program Grant competitions, an RFCP can be noncompetitive, can allow the CSO to provide technical assistance, and generally includes only the submission of the Concept Paper and not the full application.

Prior to running an RFCP process, review [Memorandum 11-006: Ensuring Transparency with VISTA Project Development and Approval](#) (<https://cnsgov.sharepoint.com/sites/VISTA/Policy/VISTA%20Policy%20Guidance/Ensuring%20Transparency%20with%20VISTA%20Project%20Development%20and%20Approval.pdf>) and these corresponding materials:

- [Request for Concept Papers template](#)
(https://cnsgov.sharepoint.com/sites/VISTA/Policy/_layouts/15/WopiFrame.aspx?sourcedoc=%7B631E2E3E-6FFD-499C-8ECB-B98010B9DBFC%7D&file=VISTA%20Transparency%20RFCP%20Template.doc&action=default)
- [Sample External Flyer](#)
(<https://cnsgov.sharepoint.com/sites/VISTA/Policy/VISTA%20Policy%20Guidance/Transparency%20-%20External%20Flyer.pdf>)
- [Project Approval Checklist](#)
(https://cnsgov.sharepoint.com/sites/VISTA/Policy/_layouts/15/WopiFrame.aspx?sourcedoc=%7BC4C63F67-FC6E-4CC3-8DA4-A1C156CE188C%7D&file=Project%20Approval%20Checklist.doc&action=default) This checklist is protected so it can be used as a form with checkboxes.

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Chapter 7: *Reserved*

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Chapter 8: Cost Share

Chapter Owners: VISTA Management, and Program Impact and Operations

Effective Date: October 15, 2016

Reviewed: September, 2016

Overview of Cost Share

VISTA receives over \$90 million each year from the U.S. Congress to support the work of VISTA projects across the country. VISTA uses cost sharing as a strategy to expand the number of VISTAs who can be supported each year. Through cost sharing, a sponsoring organization pays the living allowance for some or all of its VISTAs (including VISTAs, Leaders, or Summer Associates). CNCS's [Cost Share Policy and Procedure](http://portal.cns.gov/Portals/0/2015%20Policies/VISTA%20Cost%20Share.PDF) (<http://portal.cns.gov/Portals/0/2015%20Policies/VISTA%20Cost%20Share.PDF>) offers additional information.

Cost sharing is an effective way for VISTA to reach more local communities across the nation; however, no project should ever be turned away if it is not able to enter into a cost share agreement, unless there are no standard slots available in your state. VISTA's top priority is the development of effective anti-poverty programs in low-income communities, and it is important to recognize that cost share is not the right answer in every case. CNCS State Offices (CSOs) must ensure a careful balance between encouraging cost sharing partnerships and working with organizations, many of them small and grassroots, who cannot afford this option. With effective program development, however, CNCS can continue to make the most of the VISTA resource through cost share, while ensuring continuing support to organizations that can make a strong difference in the fight against poverty.

What Is Cost Share

Cost share is an arrangement in which a sponsoring organization pays the living allowance for one or more of its VISTAs, Leaders, or Summer Associates. The living allowance for a VISTA currently ranges from \$11,880 to \$20,640 per VISTA per year, depending on geographic location. The living allowance for a Summer Associate is at the same rate as a VISTA; however, the annual amount is prorated to reflect the shorter service term (8–10 weeks). The living allowance for a Leader currently ranges from \$14,280 to \$23,040, depending on geographic location.

The VISTA program provides for all other costs for each VISTA, such as training, health care, an Education Award or cash stipend upon successful completion of service, and travel or relocation costs.

How Cost Share Works in a Standard Project

In a standard cost share arrangement, CNCS pays the VISTAs directly and invoices the sponsor bi-weekly for the living allowance of the cost share VISTAs. Cost Share sponsors are invoiced by CNCS on a bi-weekly schedule through CNCS's eGrants system. A sponsor pays the invoice by utilizing the Pay Now functionality in eGrants. Information regarding Pay Now is available via <https://www.pay.gov/>.

Living allowances funded by cost share are not paid from the VISTA budget for standard projects, but from a special U.S. Treasury account referred to as the VISTA Advanced Payments Revolving Fund (VAPR Fund). The VAPR Fund was established by Congress in 2007 and provided an initial cash infusion to pay living allowances for cost share VISTAs. It gets replenished by the reimbursements made by sponsors. Since the size of the VAPR Fund is limited, submission of regular and timely reimbursements by sponsors is critical. For this reason, sponsors are billed bi-weekly. Should reimbursements not come in as scheduled, there is a risk of depleting the VAPR Fund and jeopardizing the ability to meet cost share member payroll. It is important, therefore, for sponsors to pay their invoices promptly, and for CSOs to submit new and continuation cost share agreements to VISTA HQ and the Field Financial Management Center (FFMC) to ensure timely and accurate billing. (See the section Procedures for Processing a Cost share Project below.)

A sponsor's repayment is considered delinquent if it is not paid within 30 days of the due date on the invoice. Within 60 days of the due date on the invoice, the sponsor's debt must be paid or the sponsor must enter into a voluntary repayment plan with CNCS. If the sponsor does not pay the debt or enter into the repayment plan within the deadline, CNCS may enforce collection of the debt by any or all of the following methods:

- By transferring the debt to the U.S. Treasury for collection
- By referring the debt to a credit reporting agency, a private collection contractor, or the Department of Justice
- By referring the debt to the U.S. Treasury for offset against any refund of the overpayment of tax
- By administrative offset – the withholding of any funds otherwise payable by CNCS or the United States to any person or organization, or the seizure of funds held by CNCS or the United States, in order to satisfy a claim or a debt owed.

CSOs can access the cost share invoices for a sponsor in eGrants phase II. It is important for CSOs to review these invoices to take note of the sponsors who are delayed in their reimbursements. If a cost share reimbursement is at least 90 days past due, CSO staff should contact their Area Manager to

discuss what steps should be taken to address this. At a minimum, the conversation should address whether:

- the agreement should be renewed or amended
- additional or reenrolled VISTAs (standard or cost share) may be placed or permitted to remain on the project until any outstanding balance under the current agreement is paid in full

Sponsors are required to pay CNCS the full reimbursement amount set forth on each invoice, by the date specified on the invoice. Any reimbursement amount unpaid by the date specified on the invoice becomes a delinquent debt. A Sponsor may propose a voluntary repayment agreement. This would allow the Sponsor to repay delinquent debt owed to CNCS through a voluntary repayment agreement in lieu of CNCS taking other collection actions allowed under its Debt Collection Policy and Procedure guidance (<http://portal.cns.gov/Portals/0/2015%20Policies/Debt%20Collection.pdf>). This includes but is not limited to denying the continuation of the VISTA project or suspending/terminating the VISTA project prior to the conclusion of the last term of service date for all VISTA Members currently assigned to the Sponsor.

CNCS does not entertain requests for waivers or forgiveness of outstanding debt and will enact rights regarding debt collection when necessary.

How Cost Share Works in a Program Grant Project

The VISTA program is allowed, by law, to allocate a limited amount of funds to Program Grants. For such projects, the grant to a project sponsor includes funds for the living allowance and other member benefits. The living allowances for VISTAs assigned to projects with Program Grants are paid directly by the sponsoring organization.

When a Program Grant is awarded, the amount of the grant is calculated taking into account any cost share commitment. The grantee is responsible for directly paying a cost share VISTA's living allowance from its own funds, and should be accounted as such in the sponsor's accounting system. Unlike in a standard project, CNCS does not pay the living allowance and seek reimbursement.

For projects that are funded through Program Grants, the cost share appears as a nonfederal contribution to the living allowance and is reported in the [Financial Status Report](http://www.nationalservice.gov/sites/default/files/documents/cncs_fsr_sf269.pdf) (FSR) (http://www.nationalservice.gov/sites/default/files/documents/cncs_fsr_sf269.pdf).

Developing Cost Share Projects

Cost share planning by a CSO is based on several factors. A CSO receives its MSY allocation and cost share target each year. The CSO determines how many new projects and corresponding VISTA positions

it can support based on the number of existing projects to be continued and the number to be phased out. A CSO also assesses which projects in its portfolio are likely candidates for cost sharing.

Cost share discussions should begin at the outset with any organization wishing to sponsor a VISTA project. Cost sharing may happen during the first year of the project or started or increased in the subsequent years of the project. The sponsor's use of cost share is subject to annual review and renewal every 12 months. Some cost share arrangements begin in the second or third year of a project. Cost share may not be required but is strongly encouraged for projects wishing to have VISTA resources beyond the third year. VISTA's top priority is the development of effective anti-poverty programs in low-income communities, and it is important to recognize that cost share is not the right answer in every case.

After a project has been processed to the Staff Review screen in eGrants, eGrants generates the cost share Memorandum of Agreement (MA) that includes the cost share text. Among other things, the cost share MA details the specific cost share commitment, which is open to review and renewal every 12 months.

FINANCIAL EVALUATION OF SPONSOR

Special steps must be taken for applicants who wish to cost share VISTA resources. The CSO, with assistance of the FFMC, conducts a financial strength test to evaluate a potential sponsor's capacity to contribute cost share based on agreed-upon criteria, and recommends moving forward (or not) to the Budget Office. The CSO Program Officer submits the recommendation via the eGrants comments field and emails their final approval to the Budget office. The Budget Officer may, in cases where financial data is unclear, request additional documentation from the CSO. More information about cost share and this process is available in [Policy Number: 705, VISTA Cost Share Policy and Procedures \(http://portal.cns.gov/Portals/0/2015%20Policies/VISTA%20Cost%20Share.PDF\)](http://portal.cns.gov/Portals/0/2015%20Policies/VISTA%20Cost%20Share.PDF).

Benefits of Cost Share

In fiscal year 2015, cost share partnerships supported approximately 1,140 VISTA positions across the country. VISTAs placed under a cost share agreement are subject to the same terms, conditions, and benefits as non-cost share members. This arrangement is an affordable way for an agency to increase its number of VISTAs. The arrangement also frees up VISTA slots for new organizations to take advantage of this limited resource.

In summary, cost share partnerships:

- Help expand VISTA resources across the country
- Demonstrate that sponsors are invested in the success of their VISTA project
- May be a method organizations can employ to sustain a high quality VISTA project and permit projects to go beyond a third year

- Provide a means to expand a relationship as an organization becomes more well-funded and established

Ways to Develop Cost Share

There are many ways to approach developing cost share projects depending on the type of project, the age of the project, and the financial stability of the organization. For example, a project entering its second year and requesting four VISTAs, might be asked to cost share one of the four VISTAs. Another project with the same request might be asked to cost share two of its VISTAs, resulting in a “buy one, get one” approach. Another example is a project that completed year two with four VISTAs in a “buy one get one” or “one for one,” but in year three, it could cost share all four.

Cost share can be a way to encourage an organization to be more independent and not to rely solely on CNCS resources. However, while cost sharing is an effective way for VISTA to reach more local communities across the nation, no project should ever be turned away if it is not able to enter into a cost share agreement. CSOs must ensure a careful balance between encouraging cost sharing partnerships and working with organizations, many of them small and grassroots, which cannot afford this option.

The following list is a collection of CSO recommendations and strategies to help CSOs maintain and expand cost share partnerships. This is a compilation of insights and proven practices.

- Introduce the concept of cost share from the outset, when conducting project outreach and development. Whenever possible, meet face to face with potential sponsors to introduce cost share. Cost share is not for every organization. If it is determined that cost share is not a viable option for the organization, move to the discussion of standard slots. While a sponsor may be unlikely to cost share in the first year, it may do so by year two or three
- Speak the sponsor’s language. Most nonprofits are accustomed to cash match requirements for federal or state grants. Use this to begin the dialogue. Be sure to explain, unlike a match, cost share is *not* a requirement and there are some benefits of cost share
- Emphasize the level of support CNCS is prepared to leverage against their funding – i.e., health insurance, training, payroll services, and assistance with national recruiting
- Develop an investment chart that outlines CNCS’s outlay of resources versus those of the sponsor
- Help the potential sponsor understand how to use grant money as a source for cost share. Identify federal, state, and local sources
- Give examples of how other project sponsors in the state cost share
- To build cost share slots, identify intermediary sponsors that have widely related contacts and are able to negotiate and establish dialogue with smaller organizations
- Emphasize the “buy one, get one” message

- Highlight the value of VISTA
- Tell sponsors that cost sharing helped place more VISTAs in their communities
- One CSO uses the following script when meeting with potential sponsors: “The Cost share partnership is a quick, easy, and low-cost way to leverage the human resources needed to jump start new anti-poverty projects without encountering the complexities and overhead costs associated with startup or expansion. As a cost share partner, the sponsoring organization contributes the living allowance for some members. In return, VISTA covers the costs of a series of benefits and services for the members.”
- Work actively with sponsors to help them build the capacity they need to cost share. Explain how they can begin strategizing and planning for cost share in subsequent years
- Develop a strong, candid relationship with the organization’s CEO or other funding decision makers
- Customize a cover letter to the sponsoring organization. Outline how VISTA can assist the organization in addressing its core mission
- A few CSOs incorporate cost share into their existing application documents. One CSO included a description of cost share in its project development guidance for potential applicants

Procedures for Processing a Standard Cost Share Project

The required documents for a VISTA cost share project proposal are the same as those for a standard project, except that CSOs use the Cost Share Memorandum of Agreement (MA) rather than the standard Memorandum of Agreement. These documents consist of:

- Concept paper
- Application
- Cost share MA

During the application process in eGrants, the applicant should check the Cost Share box and select Standard as the program type in the Application section. The appropriate budget sections will be created in eGrants for the applicant to complete. Once the application is submitted, the CSO processes the application to “Approve for XO Awards.” Refer to chapter 10 for Cost Share application instructions.

For information on processing Memorandums of Agreement in eGrants, see the “VISTA CNCS Staff MA Electronic Process Instructions” in the Appendix. CNCS Internal operations necessitate a few key requirements with regards to cost share processing. CSOs should be sure to:

- Start the cost share project at the beginning of a pay period to ensure accurate allowance payment to VISTAs
- If the sponsor does not sign the MA electronically, keep a copy of the MA for at least three years after the project closes. The MA needs to be available should the CSO or Headquarters need to follow up with sponsors on an issue, such as outstanding reimbursement payments

Amending a Cost Share Agreement

Please follow eGrants guidance for how to process a cost share amendment in Chapter 10.

Project Continuation

VISTA projects are generally eligible to apply for up to two continuation periods. Each continuation period is for one year. The process for a VISTA project to attain continuation begins four months (120 days) prior to the end of the current project year. At this time, the sponsoring organization completes a continuation application in eGrants and must submit it no later than 90 days before the current project year ends.

The continuation process begins with a thorough review of the project's accomplishments to date, and concludes with a decision by the CSO to continue or close the project at the end of the current project year. If the project has been successful in meeting its goals and building sustainability, continuation is highly probable; however, a continuation is not guaranteed. The CSO reviews the application within 15 business days of receipt or at least 75 days prior to the end of the Memorandum of Agreement.

At a minimum, the CSO reviews the following aspects of the project:

- Previous year's accomplishments, which must be included in the continuation proposal
- Long-range plans, especially regarding project sustainability, which must be discussed in the continuation proposal
- Project progress reports, monitoring reports, biweekly Sponsor Verification Forms, and feedback from VISTAs to ensure the project is making substantial progress in meeting goals and objectives
- Level of recruitment and retention of VISTAs
- Payment of Cost Share invoices

The CSO bases the decision to continue a project on the following conditions:

- VISTA resources are available
- The project's progress toward achieving capacity-building and self-sufficiency goals
- The project's performance in meeting its goals and objectives
- Whether the project has any delinquent cost-share invoices/balances
- The project's compliance with provisions contained in the Memorandum of Agreement and other applicable guidelines and regulations

Once the continuation application is approved, the sponsoring organization and the CSO sign a new Memorandum of Agreement for the new project period.

Procedures for Processing a Cost Share Project with a Support Grant

First, applicants should submit the application in eGrants, checking the Cost Share box and selecting Support Grant as the program type in the Application section. The appropriate budget sections will be created in eGrants for them to complete.

Once the application is submitted, the CSO processes the application to “Approve for CSHR XO Awards.” The CSHR XO moves the grant to the FFMC and the FFMC processes the application and awards the application.

To ensure the grant is processed by all appropriate offices (Budget and FFMC), the Executive Officer and Executive Officer cost share will be identified and selected on the Staff Review Information screen in eGrants. The following screen shot shows all of the staff that will need to be identified in the staff review screen when processing the grant:

Application Information	Summary/Issues	Service
Proposed Start Date	02/23/2014	Proposed End Date 0
Program Name	Growing Kings - Building Stronger Men E	
Program Officer	Wright, Tawanna	
Senior Program Officer	Bishop, Jacqueline	
Program Office Director		
Grants Officer	Walker, Yvonne	
Senior Grants Officer	Decolli, Anthony	
Executive Officer	George, Michelle	
Ex. Officer Cost Share	George, Michelle	
Progress Report Status		
Service Center	Southern Cluster	

NOTE: With GMM< the XO cost share step will be eliminated.

Cost Share Purpose Codes and Roles

The chart below contains the purpose codes used by CSOs and the VMSU for assigning cost share VISTAs in the Member Portal/eSPAN. These codes became effective March 2007 and are the only ones to be used. The cost share billing system generates invoices for sponsors with current MAs based on the non-grant cost share codes. Only VISTA projects with Program Grants should have VISTAs assigned using the grant purpose codes (Q21, Q26, and Q30).

PURPOSE CODE (PC) KEY

PC	Budget Category	Role	Description
Q09	CSHR	FT	Cost share
Q19	CSHR	LDR	Cost-share Leader
Q21	GRT-CSHR	FT	Grant cost share
Q26	GRT-CSHR	SMR	Grant cost share summer
Q29	CSHR	SMR	Cost-share summer
Q30	GRT-CSHR	LDR	Grant cost-share Leader

Additional Resources

- National Service Hotline – sponsors’ and CSOs’ cost share-related questions should be directed to the Hotline at 1-800-942-2677 or <https://questions.nationalservice.gov>
- Sponsors are encouraged to review the Cost Share Billing & Payment Sponsor Manual on the VISTA Campus at <https://www.vistacampus.gov/resources/cost-share-billing-payment-sponsor-manual>

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Chapter 9:

Summer Associate Program

Chapter Owners: Program Impact and Operations, and VISTA Member Support Unit

Effective Date: October 15, 2016

Reviewed: September, 2016

Overview of Summer Associate Program ¹³

The VISTA program allows for existing project sponsors to supplement their anti-poverty activities with an infusion of "hands-on volunteers" during the summer months. Unlike year-round VISTAs, Summer Associates can perform direct service activities without limitation. VISTAs may also serve as mentors and coordinators for the Summer Associates, however they are unable to directly supervise the Summer Associate members. The summer program is a prime opportunity to introduce individuals, particularly college-age students, to national service with the hope they will participate in a full-time programs later on. Summer Associates serve for either 8 weeks (56 days), 9 weeks (63 days), or 10 weeks (70 days).

The Summer Associate program offers individuals the opportunity to participate for eight, nine, or ten weeks in an intensive level of summer service that expands on existing sponsors' service plans. Summer efforts, combined with ongoing VISTA programming, should result in:

- A credible effort to help people escape poverty, not simply make poverty more tolerable
- Outcomes that increase the project's direct impact on those being served

Sponsor Eligibility

The CNCS State Office (CSO) may invite existing sponsors of year-round VISTA projects to apply for Summer Associates. Their projects must be current on all reporting requirements and, if applicable, compliant with all fiscal responsibilities.

Current sponsors, including those approved within the last year, must have the capacity to implement the summer program and understand the link between the summer program results and full-time VISTA service activities.

Sponsors with standard projects are eligible for MSY (member service year) augmentations to support Summer Associates. The CSO should encourage sponsors to use cost-share resources first, if they have a cost-share project.

¹³ [45 C.F.R. §2556.500 \(2016\)](#).

Sponsors with Program Grants may, with CSO approval, use unexpended grant funds to support Summer Associates. Sponsors with Program Grants that are producing at full capacity may apply to the CSO for grant augmentation funds to support Summer Associates.

Determining the Number of Summer Associates

VISTA HQ and the Area Manager negotiate the number of MSYs for the cluster. Decisions concerning the number of MSYs are based on demand, the availability of Education Awards, and the availability of VISTA funds. Due to the timing of federal appropriations, CNCS usually does not know whether resources for a given fiscal year are available until after the start of the fiscal year. Once the availability of Summer Associate resources is known, VISTA HQ and Area Managers notify CSOs that they may solicit interest from sponsors.

There is no minimum or maximum number of Summer Associates required for a project. Allocations for Summer Associate programs must be used only for that purpose. The CSO should encourage sponsors to cost share some of their Summer Associates. A cost share portion is not required, however, it allows for additional Summer Associates to be placed in order to create the greatest impact on local communications with limited cost to CNCS.

Project Duration

If a sponsor has a Summer Associate project that will last longer than ten weeks, encourage the sponsor to divide the project into two phases and stagger the start of each Summer Associate group. For example, if a project will last 15 weeks, Summer Associate group #1 can begin on week #1 of the project, while Summer Associate group #2 can come onboard at week #5. This allows for Summer Associate coverage throughout the entire 15 weeks project with a six week overlap between the two groups. See table below for an example.

Project Week	Summer Associate Group #1	Summer Associate Group #2
1	<i>Group #1 begins</i>	
2	Group #1 serves	
3	Group #1 serves	
4	Group #1 serves	
5	Group #1 serves	
6	Group #1 serves	<i>Group #2 begins</i>
7	Group #1 serves	Group #2 serves

8	Group #1 serves	Group #2 serves
9	Group #1 serves	Group #2 serves
10	<i>Group #1 ends</i>	Group #2 serves
11		Group #2 serves
12		Group #2 serves
13		Group #2 serves
14		Group #2 serves
15		<i>Group #2 ends</i>

Using the Summer Associates Chart in the VISTA Budget and Production Folder

ENTERING START AND END DATES OF PROJECTS

CSOs submit projections of the resources needed in the Summer Associates Chart located on the CNCS shared drive in the “S:\\VISTA Budget and Production\FY2016 Budget\Summer Associates - 2016” folder. Summer projects may operate for eight, nine, or ten weeks; CSO staff enter the projected start and end dates of projects.

CALCULATING THE NUMBER OF MSYS

- The daily MSY production factor is: One MSY divided by 365 days = 0.00274 MSYs per day
- The number of service days for the Summer Associate program is the number of weeks times seven. For example, an 8-week program requires 56 days of service (8 weeks x 7 days per week); a 9-week program requires 63 days of service (9 weeks x 7 days per week); a 10-week program requires 70 days of service (10 weeks x 7 days)
- The number of MSYs is the number of Summer Associates times the number of service days times the MSY factor. For example, a project with 15 participants for 8 weeks requires 2.3 MSYs (15 x 56 x 0.00274 = 2.3016)

ENTERING SUPPORT FUND REQUESTS

Sponsors may request support funds of a modest amount to assist with transportation. Sponsors must include a description of how they plan to use these funds in their concept paper (see the “Concept Paper Submission” section below). Encourage sponsors to use as many local resources as possible to

provide this support. Requests for additional grant funds must follow the standard request and approval process outlined in Chapter 12: Grants.

Program Design

The Summer Associate program is an opportunity to enhance an existing project's approved project. As such, summer service assignments (be they direct service or capacity building in nature) should advance the sponsoring organization's overall project. Sponsors should have the ability to recruit, supervise, and effectively use the Summer Associates. Full-year VISTAs should be involved in the planning process for the summer program, but they cannot be directly responsible for managing Summer Associate members. CSO staff should discuss with sponsors about adding a Summer Associate component to an existing VISTA project as long as it addresses a community need to combat poverty.

Specific member assignments may vary, and sponsors should consider an effective mix of indirect and capacity building service activities. For example, Associates could:

- Recruit, train, and coordinate (but not select or directly supervise) community-based volunteers, including high school and college students and older adults
- Structure long-term ways for involving community members in project activities
- Generate materials, supplies, and space for the project
- Involve the private sector in the project
- Develop materials for year-round project activities
- Conduct community education, outreach, and awareness related to the project

Summer Associate programs operate for 8 weeks (56 days), 9 weeks (63 days), or 10 weeks (70 days). Summer Associate programs begin no earlier than May and end no later than August of the same year. See the annual "Summer Associate Guidance for Staff" document for specific dates and other requirements for Summer Associate members. The guidance is available on the VISTA Program Impact and Operations SharePoint site <https://cns.gov.sharepoint.com/sites/VISTA/pio.html/default.aspx>.

Sponsors Applying for Summer Associates

The concept paper process may vary from one CNCS State Office (CSO) to another. Usually, the state program director (SPD) assigns a state Program Officer to work with the sponsor to develop the concept paper, if guidance is needed. Sponsors submit concept papers to request Summer Associates to their CSO for review and approval by the state program director and the Area Manager.

Because the Summer Associate program is limited to existing VISTA sponsors, concept papers (3-5 pages) should be developed in accordance with the following outline:

- Name of sponsoring organization

- Name of supervisor
- Project number
- Number of Summer Associates requested
- Plan for recruiting high quality Associates
- Length of the summer program: 8 weeks (56 days), 9 weeks (63 days), or 10 weeks (70 days).
- Statement of the poverty-related problem or challenge to be addressed
- Narrative that includes the following:
 - Description of summer project activities, including expected outputs and outcomes from this initiative
 - Description of how community partners will contribute to the project's success
 - Description of pre-service and in-service training to be provided
 - Indication of how supervision and service-related travel will be provided
 - Description of end-of-summer assessment and recognition event to be conducted
 - If applicable, amount requested for service-related travel of Summer Associates

Summer Associate Application Review and Approval

Area Managers establish a cluster timeline for submission of concept papers based on local schedules of recruitment, training, and other workload factors. Once the sponsor submits the concept paper, the CSO acknowledges its receipt via phone or email and determines a timeframe for review.

The CSO reviews the concept papers and submits its recommended Summer Associate program concept papers to the Area Manager for approval. The CSO provides the following information for each request:

- Number of MSYs requested
- Living allowance rate(s) for project location(s)
- Statement on the applicant's past performance (programmatic progress and adequacy of management) and on whether the applicant is current on all reporting requirements or fiscal responsibilities
- Sponsor's concept paper

Approval criteria for the CSO and the Area Manager are:

- Applicant is a current sponsor
- Applicant has the capacity to implement the summer program as evidenced by its past performance (sufficient programmatic progress and adequate management of the VISTA project)
- Applicant is current on all reporting requirements and, if applicable, fiscal responsibilities
- Proposed Summer Associates project operates for 8, 9, or 10 weeks between May and August of the current year
- Applicant has a plan for recruiting high quality Summer Associates

- Applicant has a plan for holding pre-service and in-service training for the Summer Associates
- Proposed Summer Associate project furthers one or more of CNCS’s strategic initiatives
- Proposed project is a credible effort to help people escape poverty, not simply make poverty more tolerable
- If applicable, amount of Support Grant funds for transportation is reasonable

Amending the Awarded Application in eGrants

Once the appropriate staff (CSO and Area Manager as required per cluster guidelines) have approved the concept paper, the sponsor submits an amendment, through eGrants, to modify its awarded application to reflect the Summer Associate programming. Sponsors will follow one of two procedures, depending on when their application was awarded in eGrants:

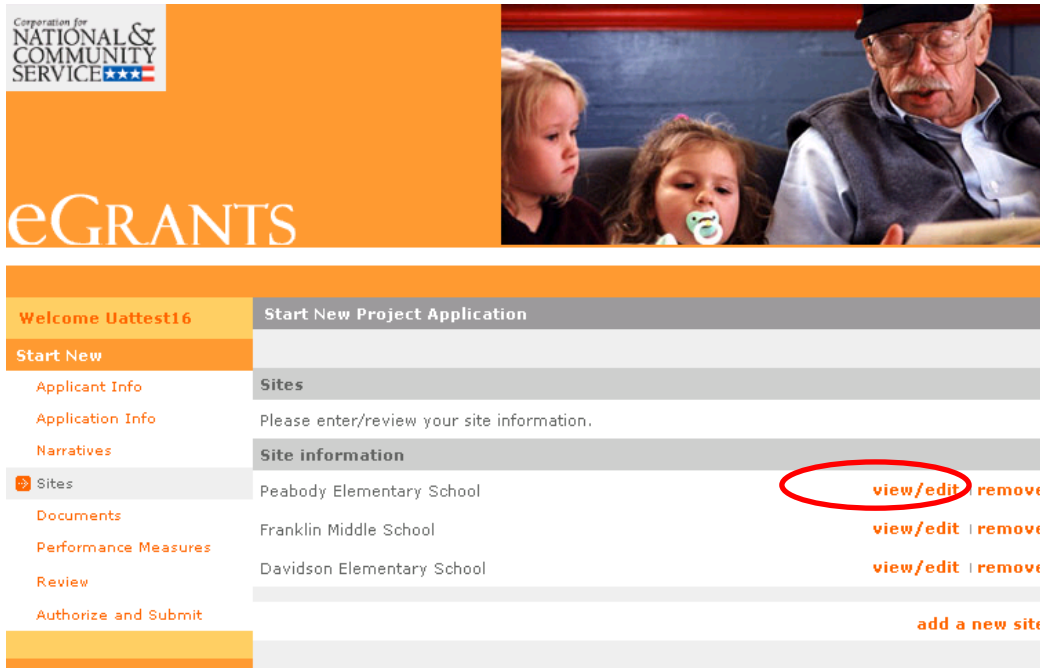
- If their application was awarded using a FY13 NOFO or prior, the sponsors amend their Project Plan. The amendment includes at least one goal supported by several performance milestones *or*
- If their application was awarded using a FY14 NOFO or later, the sponsors amend their application. When creating an amendment, they select the “Modify Awarded Slots/Members/VSYS” and the “Revise Narrative” type amendments. They then make adjustments to the narratives, sites, performance measures, and budget as needed

NARRATIVES

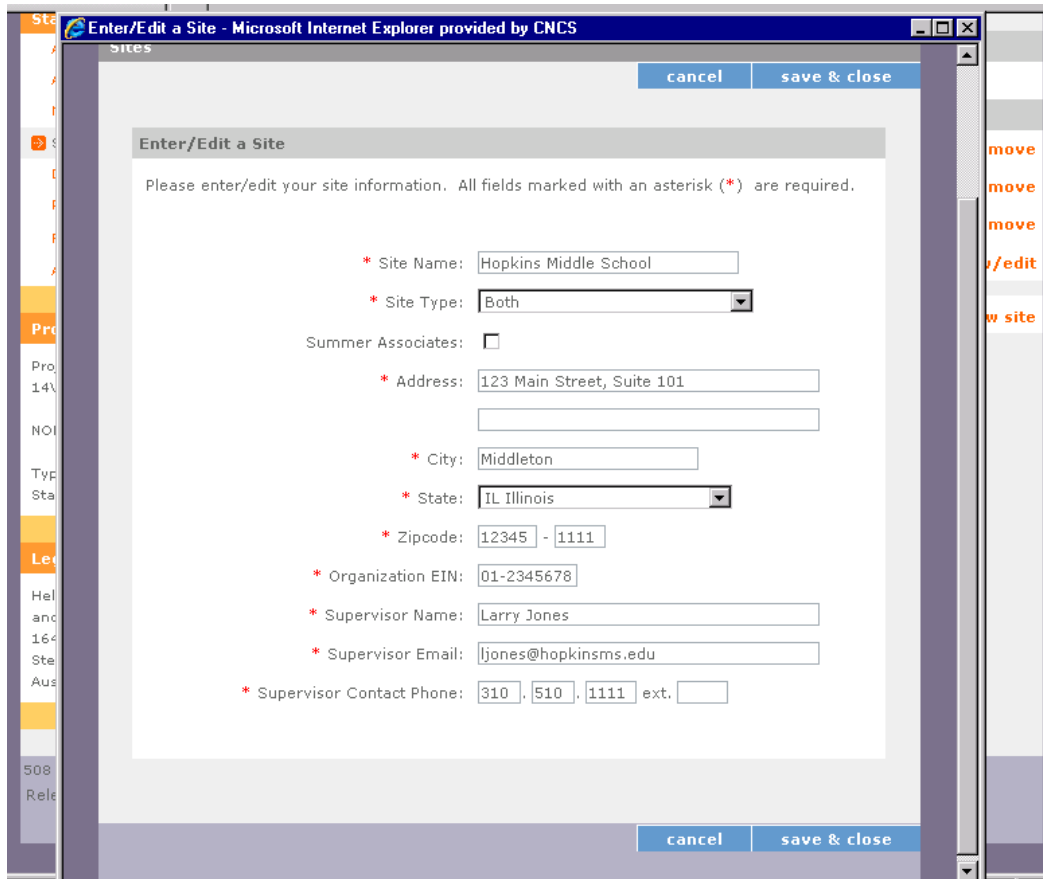
In the “Other” section, sponsors include a narrative of the proposed activities, and if applicable, list the placement sites.

SITES

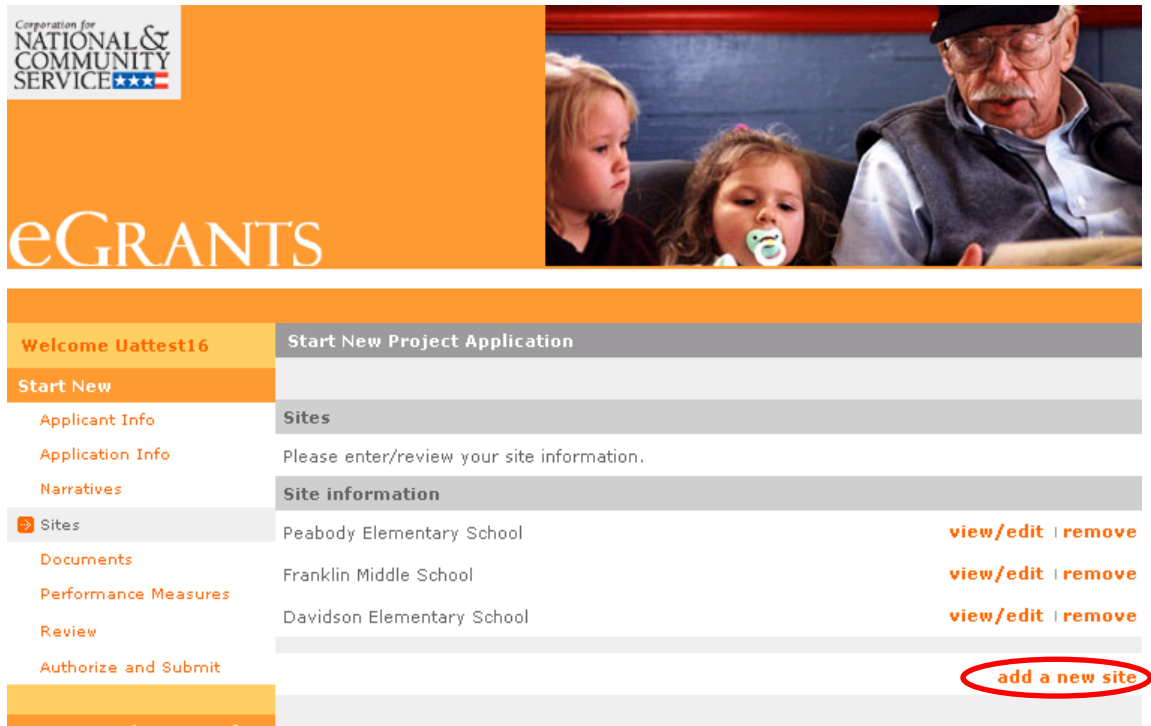
In the “Sites” section, for existing Sites that will now also receive a Summer Associate, sponsors should click “view/edit” next to the Site.



When the Site pop-up window opens, sponsors should check the Summer Associates check box. They should save and close the pop up. They will then be returned to the Sites list.



If there will be new sites as a result of the Summer Associate programming, they should click “add a new site” on the Sites list, add the information for that site and make sure to click the Summer Associate check box.



PERFORMANCE MEASURES

Sponsors must enter performance measures for Summer Associates. Sponsors should follow the instructions in the “Summer Associate Resources” section in the project application instructions available on the VISTA Program Impact and Operations SharePoint page:

<https://cmsgov.sharepoint.com/sites/VISTA/pio.html/default.aspx>.

Sponsors enter performance measurement information differently, depending on whether the Summer Associate activities are capacity building or direct service.

As shown below, on the Performance Measure tab of the Performance Measure Module, sponsors select a site and enter the performance measure information for that selected site. They will also see the question, “Are you creating this Performance Measure for:” and an adjacent drop-down menu to “Select VISTA Type.” They should choose “Summer Associate.” (If they do not see this question, they will need to click “Back to eGrants Application” at the top of the screen and make sure that at least one of the Sites has the “Summer Associate” indicator box checked. Refer to section “IV. Sites” of the project application instructions.)

Performance Measures | Anti-Poverty | Summary

Summary of Performance Measures

Site	VISTA Type	Service Type	Focus Area	Objective	Capacity Goal	Project Year	Output	Outcome	# Requested	Complete	Edit	Delete
There are currently no Performance measures created for this application.												

Are you creating this Performance Measure for: Full Time

--Select VISTA Type--

- Full Time
- Summer Associate

* Site Name: --Select Site Name-- Project Year: --Select Project Year--

* Capacity Goal

- Capacity Goal
 - Scale/Reach
 - Effectiveness
 - Efficiency
 - Leveraged Resources

Once “Summer Associate” is selected, a new drop-down menu labeled “Summer Associate Service Type” will appear.

NATIONALS COMMUNITY SERVICE

NOFA: VISTA PM Test
Type: New Application
Status: Grantee Initial Entry
Submitted:
Legal Applicant Name: Honolulu Community Action Program, Inc.

eGRANTS Performance Measures

Home Page | Performance Measures | Anti-Poverty | Summary

Summary of Performance Measures

ID	Site	VISTA Type	Service Type	Focus Area	Objective	Capacity Goal	Project Year	Output	Outcome	# Requested	Complete	Edit	Delete	Duplicate
1	Test Site II	Full Time	Capacity Building	Capacity Building	Capacity Building & Leverage	Scale/Reach	3	G3-3.1	G3-3.3	50	Yes	Edit	Delete	Duplicate

Screen Instructions

On this tab, you will enter information about the capacity building aspects of each of your proposed project sites for the project year.

If you are applying for Summer Associate resources (as indicated in the Sites section), you will also use this screen to separately provide information about your proposed Summer Associate programming.

For more detailed instructions, click on the "help" button on the top right corner of the screen.

Are you creating this Performance Measure for: Summer Associate

Summer Associate Service Type:

- Direct Service
- Capacity Building

* Site Name: --Select Site Name-- Project Year: --Select Project Year--

* Service Activities

- Service Activities

Service Activity	Description
No records found.	

* Output

- Outputs

No records found.	
-------------------	--

Save | Back | Next

The “Summer Associate Service Type” drop-down menu includes two selections from which the applicants must choose the nature of service activities for the particular site they have selected:

- **Capacity Building** – Sponsors select this option if the Summer Associates at the site will primarily perform capacity-building activities. Since the steps for entering capacity-building Summer Associates are the same as those for VISTAs (Full Time), sponsors should refer to page 14 of the application instructions for “VISTAs/Leaders (Full Time)” to enter performance measure information for capacity building Summer Associates, substituting Summer Associates for VISTAs/Leaders where appropriate.
- **Direct Service** – Sponsors select this option if the Summer Associates at this site will primarily perform direct-service activities. Direct service refers to any form of assistance provided directly to the individuals or targeted groups and communities that make up the beneficiary population. For example, Summer Associates who spend most of their term repairing houses, tutoring children, or providing financial coaching to individuals are performing direct-service activities, not capacity building. Once “Direct Service” is selected, the fields on the screen will change to allow the sponsor to enter performance measure data for direct service. Sponsors should then proceed to the instructions in the “Direct Service” section in the application.

For Direct Service Summer Associates, only the Performance Measure tab is available. The “Anti-Poverty” tab is not completed.

For direct service, the module adjusts so that only the Performance Measure tab needs to be completed (i.e., the Anti-Poverty tab is not used when entering performance measures related to Direct Service). On the Performance Measure tab, the applicant will identify the site, select a Focus Area, Objective, give a brief description, identify at least one Anti-Poverty Output and Outcome - also known as [Goal 1 Measures](http://www.nationalservice.gov/resources/performance-measurement/vista) (<http://www.nationalservice.gov/resources/performance-measurement/vista>) - and at least

one Service Activity. Sponsors must also enter data collection plans for their selected performance measures and report data in a future Progress Report.

BUDGET

The sponsor should adjust the budget to reflect the new Summer Associate resources.

Recruitment and Placement

The AmeriCorps Member Portal is used to recruit for Summer Associate positions. This system allows projects to provide separate listings for VISTA and Summer Associate positions. Prospective Summer Associates are able to research national service opportunities, apply online, and have direct dialogue with a prospective supervisor.

Basic eligibility criteria:

- Associates must be at least 18 years of age at the time of placement
- Associates must serve on a full-time basis during the project period
- Associates must not be listed on the National Sex Offenders Public Registry

No relocation allowances will be provided for Summer Associates. However, sponsoring organizations may cover expenses related to a Summer Associate who relocates in order to serve. In addition, the VISTA housing policy encourages sponsors to find ways to provide free or low-cost housing for VISTAs. This practice is acceptable for the Summer Associate programs as well, and it might yield a larger and more diverse applicant pool.

Once approved, sponsoring organizations should be encouraged to secure commitments from Associate candidates as soon as possible. Delays in obtaining commitments may result in fewer candidates for these positions. Sponsors should advise applicants that final selection of Summer Associate candidates rests with the CSO.

ENROLLING A CANDIDATE

Summer Associates must be placed at least two weeks prior to their start date. For a step-by-step overview on completing Summer Associate member actions in the Staff Portal, please refer to the [VMSU Instructions for Processing VISTA Member Actions](http://portal.cns.gov/Portals/0/Instructions%20for%20Processing%20VISTA%20Member%20Actions-Feb%202016.pdf) (<http://portal.cns.gov/Portals/0/Instructions%20for%20Processing%20VISTA%20Member%20Actions-Feb%202016.pdf>). Contact the VMSU if an individual wishing to serve as a Summer Associate cannot be placed at least two weeks prior to their start date.

Successful Summer Associates who request enrollment as a full-year VISTA member should be given priority consideration.

MANDATORY ONLINE COURSEWORK AND DOCUMENTATION

Sponsors and CSOs should direct candidates to the [VISTA Campus](https://www.vistacampus.gov/) (<https://www.vistacampus.gov/>). The “[Starting Summer Associates](https://www.vistacampus.gov/starting-summer-associates)” (<https://www.vistacampus.gov/starting-summer-associates>) section of the VISTA Campus details what coursework and forms the Associate must complete prior to the start of their service term. In addition to the required online courses, and onboarding forms, Summer Associates will also find that optional coursework is covered on that page.

Candidates must also complete the following documents before they begin service:

- Direct Deposit form
- Internal Revenue Service W-4 form
- Designation of Beneficiary form
- VISTA Summer Associate Benefits Election form (paper)
- Summer Associate Terms, Conditions, and Benefits Course certification
- AmeriCorps VISTA Oath form (administered according to oath guidelines)

Conducting Department of Justice National Sex Offender Public Website Search

The CSO administering the related project conducts a database search on the [Department of Justice’s Dru Sjodin National Sex Offender Public Website](https://www.nsopw.gov/) (<https://www.nsopw.gov/>) for each Summer Associate before that person’s application is approved. This search is conducted upon receiving the application from the sponsoring agency that has recommended the applicant. See the “Conducting Department of Justice NSOPW Database Search” section and Appendix 16A of the VDR chapter on Criminal History Checks for more information and a step-by-step description of the process. Place all Summer Associate NSOPR results in the corresponding S: Drive folder. Further directions will be made available regarding SharePoint once a system is in place.

Benefits and Support ¹⁴

Summer Associates receive:

- A living allowance for the time served, which is equal to the amount received by full-year members serving in the same area
- An Eli Segal AmeriCorps Education Award from the National Service Trust or a summer stipend which cannot be changed once paperwork is submitted to the VMSU

¹⁴ [45 C.F.R. §2556.505 \(2016\)](#).

The summer stipend is calculated based on the number of days a Summer Associate is scheduled to serve at the sponsoring organization, multiplied by the daily accrual rate. Currently, the summer stipend accrues at a daily rate of \$4.11.

Summer Associates *do not* receive:

- Health care
- Life insurance
- Child care allowances
- Relocation allowances

SUMMER ASSOCIATE END-OF-SERVICE STIPEND AMOUNTS

The chart below is for internal staff use only. Do not share with Summer Associates as the rates are subject to change.

Number of days served	Daily accrual rate**	Stipend gross total
56 days	\$ 4.11	\$ 230.16
63 days	\$4.11	\$258.93
70 days	\$ 4.11	\$ 287.70

The Summer Associate automatically receives the payment with the last subsistence payment, provided the Summer Associate's term of service is completed as scheduled. Federal income tax and Social Security (FICA) deductions are withheld from the stipend at the time of payment.

Each Summer Associate completes the VISTA Summer Associates Benefit Election Form to elect either the Education Award or the end-of-service cash summer stipend.

LEAVE

Three categories of leave are discussed below.

HOLIDAYS

Summer Associates receive leave on holidays observed by their sponsor, and have weekends free, depending on the sponsor's needs, policies, and regular work schedule. Sponsors may also adjust schedules for Summer Associates, as they would for a VISTA member, to compensate for service during weekends or holidays.

EMERGENCY LEAVE

When an emergency or illness prevents a Summer Associate from serving, sponsors and CNCS staff may assist the Summer Associate in meeting the required number of service days. CNCS staff must balance associate support against project support, avoiding excessive leave while supporting the associate through an emergency or illness.

The parameters within which sponsors and CNCS staff may support Summer Associates in fulfilling their summer obligations are:

- Summer Associates must report all absences from scheduled service days to their site supervisor. The site supervisor will report the absence to the overall project supervisor. Unreported absence may be cause for early termination
- Supervisors may arrange for limited (1-2 days) absences that will be made up by serving extra hours or extra days
 - Supervisors should prioritize the completion of make-up hours
 - Make-up days cannot extend past the last day of the Summer Associate's service term
- Supervisors must report to the CNCS State Office a Summer Associate's absence beyond two days, and/or requests for absences that will not be made up
 - CNCS State Office staff may allow up to five additional days of emergency leave for a death or critical illness in the immediate family, but this must be approved by the State Program Director in advance

JURY DUTY

Summer Associates are subject to jury duty; if called, the time spent on jury duty will not be counted against the term of service or educational award.

WORKER'S COMPENSATION

Associates are eligible for Worker's Compensation under the Federal Employee Compensation and Federal Tort Claims Acts.

INCOME DISREGARD

The Income Disregard provisions apply to any Summer Associate who receives government benefits.¹⁵

Staff Portal Coding of Summer Associates

The Staff Portal tracks Summer Associates by the following purpose codes:

¹⁵ [45 C.F.R. §2556.300\(d\) \(2016\)](#).

- A28 Standard Summer Associate
- A26 Grant Summer Associate
- F28 Federal Partner Summer Associate
- G28 Gift Summer Associate
- Q26 Grant Cost-Share Summer Associate
- Q29 Cost-Share Summer Associate

Citizenship Verification

Similar to full-time, regular VISTA members, a Summer Associate candidate's Social Security Number and citizenship/legal residency status must have a "Verified" status by the Social Security Administration (SSA) prior to the candidate's placement. Verification by SSA is an automated process in the My AmeriCorps portal that takes place immediately after a sponsor selects a candidate. If the Social Security Administration rejects or does not verify a candidate's status (indicated as "Returned" status in the portal), the system notifies the CSO and requests additional documentation. The CSO follows up with the sponsor to notify the candidate. The Summer Associate candidate then submits the additional required documents to the National Service Hotline for verification by the VISTA Member Support Unit. Summer Associate members cannot be activated without verification of their Social Security number and citizenship status by the SSA. Failure to verify a candidate's status before the end of the first pay period will delay the candidate's living allowance payment.

Timing of Placements

Summer Associate programs last either 8 weeks (56 days), 9 weeks (63 days), or 10 weeks (70 days). Associate programs begin no earlier than May 1 and end no later than August 31 of the same year.

CNCS State Offices should place Summer Associates toward the start of a pay period. This allows adequate time to activate the Summer Associates in our CNCS systems so they receive their first living allowance payment on their first pay date. To receive their first living allowance payment on the first pay day after they begin service, candidates must ensure all required paperwork reaches the VISTA Member Support Unit (VMSU) five days before the end of the first pay period. **If the paperwork arrives at the VMSU after the five-day deadline, Summer Associates should expect their first living allowance payment the *second* pay date after they begin.**

SUBMISSION OF DOCUMENTS BY CSO

The candidate swears in on the first day of service and completes any delinquent online paperwork. The sponsor forwards the paper End-of-Service Benefit Selection Form, and the Oath to the CSO, which then submits it to the VMSU for processing.

Within two business days of the Summer Associate’s swearing in, the CSO emails the Summer Associate packet to vmsu_summer@cns.gov. The CSO prepares the email as follows:

- Type “Summer Associate - [state]” in the subject line (e.g., “Summer Associate – Texas”)
- The body of the email should include the Summer Associate’s:
 - First and last name
 - NSPID (National Service Participant Identification) number
 - Start date of the term of service
- The following documents should be included in the Summer Associate packet:
 - AmeriCorps VISTA Oath of Service form
 - End of Service Benefit Selection form

Training

Training plans for the Summer Associates must be specific to the assignment(s), including any skill based training that is needed. All Summer Associates must attend a sponsor-organized pre-service orientation (PSO) prior to beginning service. The sponsor should hold a one-to-two-day PSO at or near the Summer Associates’ project site. When appropriate, training should reflect collaboration with other CNCS programs involved in the same or similar activities. Sponsors should also hold an end-of-summer assessment and/or recognition event for Associates.

The [VISTA Campus](https://www.vistacampus.gov/) (<https://www.vistacampus.gov/>) provides an [interactive presentation](https://www.vistacampus.gov/lessons/vista-terms-and-conditions?id=1578) (<https://www.vistacampus.gov/lessons/vista-terms-and-conditions?id=1578>) that can be used to train Summer Associates on the terms and conditions of their service.

Reporting

Projects report on the results of their Summer Associate project when they submit the Project Progress Report for the reporting period that includes their summer project.

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Chapter 10:

Project Application Processing and Approval

Chapter Owners: Program Impact and Operations

Effective Date: October 15, 2016

Reviewed: September, 2016

Overview of Project Application Review Process

CNCS accepts and reviews applications for VISTA projects throughout the year. To apply for VISTAs, a potential sponsor contacts or is referred to the CNCS State Office (CSO) in the area where the proposed project would be located to discuss application requirements and procedures. The CSO directs the applicant to eGrants, the CNCS online project application system, and provides technical assistance during the application process.

To apply for VISTA resources, organizations complete a two-step process:

- Step 1 – AmeriCorps VISTA Concept Paper
 - Organizations submit an AmeriCorps VISTA Concept Paper to the CSO. The concept paper is a preliminary screening tool that sometimes VISTA HQ uses to evaluate whether the organization would be an appropriate sponsor
- Step 2 – AmeriCorps VISTA Project Application
 - If the CSO approves the concept paper, the organization submits an AmeriCorps VISTA Project Application based on the approved concept paper. CNCS provides project application materials following approval of a concept paper

The length of the application process varies, but often the time from the initial contact to a final decision is three to five months. The actual placement of VISTAs may take up to another two to five months.

As a reminder, information on project development is available in VDR Chapter 6: Outreach to Potential Sponsors. Review the [Transparency Policy and related attachments](https://cnsgov.sharepoint.com/sites/VISTA/Policy/VISTA%20Policy%20Guidance/Ensuring%20Transparency%20with%20VISTA%20Project%20Development%20and%20Approval.pdf) (<https://cnsgov.sharepoint.com/sites/VISTA/Policy/VISTA%20Policy%20Guidance/Ensuring%20Transparency%20with%20VISTA%20Project%20Development%20and%20Approval.pdf>) to ensure transparency when developing VISTA projects.

Concept Paper and Criteria for Approval

The application review process begins with an applicant's submission of a concept paper in eGrants, a web-based system in which project applications are submitted, assessed, and approved or disapproved. While the submission of the concept paper is done through eGrants, applicants must use instructions found on a downloadable form, which is available at http://www.nationalservice.gov/sites/default/files/upload/VISTA_Concept%20Paper_2014.pdf. In the concept paper, the applicant describes the rationale for the VISTA project and the use of VISTAs.

The concept paper review process varies from CSO to CSO but all concept papers must be reviewed before the end of the fiscal year. In some CSOs, concept papers are reviewed by staff as a group. In many cases, the State Program Director (SPD) assigns a submitted concept paper to a State Program Officer for review. However, in some cases, the potential sponsor telephones the CSO, and the individual who receives the message provides the sponsor guidance in the development of the concept paper. Once the potential sponsor submits the concept paper, this same CSO staff person reviews the final submission.

If a State Commission applies for VISTA resources, the CSO should follow 05-03: Guidelines for State Offices on State Commissions Applying to Become VISTA Sponsors. In short, to avoid a possible conflict or appearance of a conflict of interest, the State Program Director of the host state [or other CNCS Ex-Officio member of the commission if the State Director is not a member of the commission] should not be involved in the decision-making process for the State Commission's concept paper.

The CSO reviews the concept paper within 15 workdays of receipt of an eGrants notification that the applicant has submitted its concept paper. At this point, the CSO should not only review the concept paper, but also conduct general due diligence about the organization, such as researching the applicant on the Internet to verify status and facts. With internet search engines like Bing and Google, CSOs can search "News" to see what stories or press releases are on the Web about the organization. You can also find information online via the [IRS \(https://www.irs.gov/charities-non-profits/search-for-charities\)](https://www.irs.gov/charities-non-profits/search-for-charities) or with [GuideStar \(http://www.guidestar.org\)](http://www.guidestar.org), a source of information about nonprofits.

The CSO State Director has the authority to approve or disapprove the concept paper. The CSO enters the approval or disapproval decision in eGrants, and the applicant is notified of the decision in eGrants. While the system generates a notice, most CSO staff follow-up with a personalized email. If the information in the concept paper is not sufficiently clear to make a determination, the CSO has the option in eGrants to select a status called Return for Rework, which sends the concept paper back to the applicant so they can make revisions. If no MSYs are currently available, but the CSO wants to develop a project with an applicant, the CSO has the option in eGrants to select a status called On Hold Pending Resources. However, all concept papers should be either accepted or rejected under the current NOFO before the expiration of the fiscal year. Concept papers in the "on hold/pending resources" or

“submitted” status should be moved to the next fiscal year NOFO. Information and instructions related to the process is sent towards the end of each fiscal year.

Criteria for determining approval/disapproval are based on whether the proposed project:

- Complies with the provisions of the Domestic Volunteer Service Act of 1973, as amended; VISTA regulations; and VISTA policies
- Fits with one or more of the CNCS’s strategic initiatives or VISTA programming priorities
- Addresses the needs of a low-income community
- Involves beneficiaries of the service and the low-income community in project development and implementation
- Leads to building organizational capacity so that the project can continue once the VISTA resources are withdrawn
- Is designed to generate public- or private-sector resources
- Promotes local volunteer service

Further, criteria for determining approval/disapproval are based on whether the applicant:

- Is a public-sector organization or a private organization designated as nonprofit by the Internal Revenue Service? (An organization that has submitted to the IRS an application for non-profit status may be considered, but its full VISTA application cannot be approved until it is designated.)
- Has resources available for VISTAs to perform their activities, such as space, supplies, and on-the-job transportation, and is able to provide emergency cash advances when needed
- Has the capacity and commitment to recruit, train, supervise, and otherwise support VISTAs recruited locally and nationally
- Understands and is committed to promoting national service
- Is experienced in the issues relating to the beneficiaries of the service
- Has the capacity to build community partnerships and collaborative efforts to achieve project sustainability

Application and Criteria for Approval

If the CSO approves the concept paper, the applicant may then submit a full project application in eGrants. While the submission of the project application is done through eGrants, applicants must use AmeriCorps VISTA Project Application Instructions found at http://www.nationalservice.gov/sites/default/files/documents/VISTA_Application_2014_0.pdf.

The CSO may give technical assistance to the applicant during the application preparation. Travel funds permitting, the CSO might visit the applicant to give technical assistance and learn about the applicant organization and the community to be served by the proposed project.

The CSO reviews the application within 30 workdays of receipt of an eGrants notification that the applicant has submitted its application. If the application could be approved but changes need to be made to the application, the reviewer selects the Return for Rework transaction in eGrants. Additionally, if MSY resources are currently not available but will be available in the same fiscal year, the reviewer can select the On Hold Pending Resources option. The CSO State Director has the authority to approve or disapprove the application. The CSO staff person enters the approval or disapproval in eGrants, and the applicant is notified of the decision in eGrants. Please refer to the eGrants Staff Manual for step-by-step instructions, as well as the Staff Review Policy: 14-001:

<https://cns.gov.sharepoint.com/sites/VISTA/Policy/VISTA%20Policy%20Guidance/2014%20Staff%20Review%20Screen.pdf>.

Criteria for determining approval or disapproval are based on whether the application:

- Continues to meet the approval criteria listed for the concept paper
- Is persuasive in relating the statement of need for the project with the project goals, intended results, activities and the VISTA assignment description
- Describes in measurable terms the anticipated results
- Demonstrates that the number of VISTAs being requested is appropriate for the project goals
- Links the skills qualifications for VISTAs with the project activities
- Utilizes the VISTA time to the maximum extent
- Demonstrates the VISTA(s) will receive orientation, on-the-job training, and supervision

COST SHARE APPLICANTS

Special steps must be taken for applicants who are wishing to cost share VISTA resources. More information about this, and cost share in general, is available in VDR Chapter 8 and [Policy Number: 705, VISTA Cost Share Policy and Procedures](#) (<http://portal.cns.gov/Portals/0/2015%20Policies/VISTA%20Cost%20Share.PDF>).

See Appendix 10A for a project approval checklist.

Memorandum of Agreement

A Memorandum of Agreement (MA) between the sponsor organization and CNCS is signed by the State Director and the authorized official of the sponsor. This agreement is a legally binding document that states the specific obligations of each party, as well as joint responsibilities. MA templates for both [standard](#) and [cost share](#) projects are on the [Program Forms page](#) of the VISTA Intranet site. For new sponsors, especially state and local governments, we highly recommended that the CSO provide the MA template at the beginning of the review process.

The MA is produced through the eGrants system. The process of signing the MA is performed through the eGrants Classic and Phase II systems. This practice allows both internal and external VISTA users to sign the MA electronically.

The process begins when a VISTA application reaches the Program Officer (PO) Certification status. The procedure for entering dates into the PO Certification is as follows:

- For Standard and Standard with cost share applications – Enter Approved Start and Approved End dates
- For Support, Program with or without cost share application – Enter both Approved Start/End dates and the Budget Start and End dates

The dates must align with pay period start and end dates. A spreadsheet of the pay period dates is available on the VISTA Intranet site at:

<http://portal.cns.gov/CNCSDepartments/DepartmentoftheChiefofProgramOperations/-OfficeofAmeriCorpsVISTA/ProgramForms.aspx>.

The CSO certifies the application and makes the MA available in eGrants Phase II for the sponsor to sign electronically. The MA is also automatically signed electronically by the appropriate CNCS staff when actions are taken to approve/certify the application.

For additional information on the electronic MA processing system, review the Electronic MA Processing Guide for Staff:

https://cns.gov.sharepoint.com/sites/VISTA/Policy/VDR/VISTA%20CNCS%20Staff_MA%20Electronic%20Process%20Instructions%20Sept%202016.pdf.

Project Continuation and Criteria for Approval

For the second and third years of the project, the project continuation, sometimes called a renewal, is for one year. The continuation process for VISTA projects begins four months (120 days) prior to the end of the current project year. It is at this time the CSO sends an invite letter to sponsor. **While the submission of the continuation application is done through eGrants, applicants must use the section for continuations found in the AmeriCorps VISTA Project Application Instructions found on a downloadable form, which is available at**

http://www.nationalservice.gov/sites/default/files/documents/VISTA_Application_2014_0.pdf. The sponsor must complete the continuation application 90 days before the current project year ends. This allows adequate time for review and notification in the event of a denial.

The continuation process begins with a thorough review of the project's accomplishments to date, and concludes with a decision by the CNCS to continue or close the project at the end of the current project year. If the project has been successful in meeting its goals and building sustainability, continuation is

highly probable; however, a continuation is never guaranteed. The CSO reviews the request within 15 workdays of receipt or at least 75 days prior to the end of the Memorandum of Agreement.

The process for reviewing a continuation proposal is similar to the review process for an initial project application, but with several important differences. The CSO reviews the application for adherence to VISTA project guidelines and the CSO's annual plan for project development. In addition, the CNCS reviews the following aspects of the project:

- Previous year's accomplishments, which must be included in the continuation proposal
- Project progress reports, monitoring reports, biweekly sponsor verification forms, and feedback from AmeriCorps VISTA members to ensure the project is making substantial progress in meeting goals and objectives. Such reports should be submitted before approving a continuation application
- Level of resource mobilization, including volunteers recruited, from the previous year, as well as plans for the coming year
- Status of cost share payments, if applicable
- Status of grant funds, if applicable
- Level of recruitment and retention of AmeriCorps VISTA members

The CSO renders a decision to continue projects in accordance with the following conditions:

- VISTA resources are available
- The project has made progress toward achieving capacity-building and self-sufficiency goals
- The project has performed well in meeting its performance measures
- The sponsor has complied with provisions contained in the Memorandum of Agreement and other applicable guidelines and regulations
- The sponsor has paid all cost share invoices. NOTE: If a Cost Share sponsor has a debt that is more than 90 days old, or the sponsor has been chronically late in paying their cost share invoices, the project cannot be renewed unless approved by the Area Manager. (Refer to the Cost Share Policy for additional information: <https://cns.gov.sharepoint.com/sites/VISTA/Policy/VISTA%20Policy%20Guidance/VISTA%20Cost%20Share%20Policy.pdf>.) Criteria for approving the renewal of a cost share project with delinquent cost share payments are limited to the following, and must be documented on the Supplemental Cost Share Continuation Application Financial Review (CAFR) form:
 - The Sponsor expresses a credible doubt about the validity of the debt
 - Significant programmatic reasons to continue as a non-cost share project
- Project progress reports, monitoring reports, biweekly member verification forms, and other reports have been submitted
- If the sponsor has a grant, funds have been expended as approved and scheduled and financial reporting is current. Consultations should be made with the assigned Grants Officer
- The sponsor is taking steps to correct any compliance findings

Once the SPD approves the continuation application, the sponsoring organization and the SPD sign a new Memorandum of Agreement for the new project period since only SPDs may sign MAs. The eGrants processing does not change for continuation.

ADDITIONAL YEARS BEYOND YEAR THREE

Approval authority for projects continuing for a fourth year or beyond lies with the Area Manager.

The criterion for the renewal of VISTA projects after the third year, subject to the availability of funds, is at least one of the following: a cost-share component; the sponsor is acting as an intermediary organization (meets requirements described below) and is changing the sites; and/or the sponsor has demonstrated an extenuating community need, such as a being the only sponsor available in a high-poverty area for the VISTA project.

To be considered an intermediary, a sponsoring organization must meet all of the following criteria:

- A minimum of three partner organizations for whom the sponsor functions as lead agency
- A demonstrated capacity to provide ongoing program management and operational training and technical assistance to the smaller partnering organizations
- A demonstrated capacity to respond to reporting requirements (aggregating of project data and outcomes, etc.) for all of the partner organizations
- A demonstrated capacity to function as a mentor agency for smaller community-based or grassroots organizations (not necessarily partners)

For VISTA projects to continue to a fourth year or beyond, the CSO provides an analysis of the project plan to the Area Manager for approval. In their analysis, State Office staff assesses the project's progress toward sustainability and the ability of the sponsor to meet the end outcomes and accomplishments described in the application.

Additional Resources

[11-006: Ensuring Transparency with VISTA Project Development and Approval](#)

[14-001: Staff Review Screen Requirements](#)

Appendix 10B: Sample New VISTA Project Checklist from Texas CSO

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Chapter 11:

Project and Member Files

Chapter Owners: VISTA Member Support Unit

Effective Date: October 15, 2016

Reviewed: September, 2016

Overview of Project and Member Files

It is CNCS's responsibility to ensure that projects are monitored, and that files are complete and can stand up to any internal or external audit. eGrants stores the project concept paper, application, progress reports, financial reports, VISTA Progress Report Supplement (VPRS), monitoring data (including annual risk assessment and compliance monitoring visits) and in some cases correspondence. Additionally, there are other documents that must be maintained in hard-copy format in the project file.

[My.AmeriCorps.gov](https://my.americorps.gov) (<https://my.americorps.gov/mp/login.do>) now houses most of the application and placement forms previously maintained in hard-copy format, but there remain documents that are hard copy only and need to be maintained either at the VMSU (VISTA Member Support Unit) or the CNCS State Office (CSO).

Required Project File Documents

All VISTA project files should have the following documents, although some may be uploaded into eGrants and eventually GMM.

APPLICATION DOCUMENTS

- Copy of most recent financial audit of the potential sponsor, if available
- Copy of Articles of Incorporation (not applicable to public entities)
- List of Board of Directors, or governing body (not applicable if public entity), and their written comments about the application (comments not applicable if you created a separate Advisory Group that will submit written comments)
- Organizational chart of the sponsor applying for the VISTA project
- Proof of tax exempt status: either IRS determination or copy of application to IRS for exemption (not applicable to public entities)
- Copy of project supervisor's resume and job description.
- Two letters of support for the proposed project from other organizations in the community and two new letters of support for renewal years

Unless changes are made to a document, annual re-submission is not required, except for the letters of support.

PROJECT DOCUMENTS

- Annual Memorandums of Agreement (hard copy only if sponsor is unable to sign in eGrants)
- Monitoring documents not stored in eGrants, such as documentation provided by the sponsor at the time of a visit, and project's response

Optional Documents

Optional documents refer to documents that should be placed in the project file when available or are kept by the sponsor.

- Hard-copy correspondence to and from the sponsoring organization (staff or Advisory Council)
- Copies of email correspondence to and from the sponsoring organization, either hard-copy or saved to flash or shared drive at project end
- Stipend Accrual and Check Register reports (for Program Grants only)

Retirement of Project File

One calendar year after a project ends, the CSO consolidates project files and retires them to the [Federal Records Center](http://www.archives.gov/frc/records-transfer-disposition.html) (<http://www.archives.gov/frc/records-transfer-disposition.html>), which maintains the project files for seven years and then destroys them.

Primary Member File

The MyAmeriCorps portal retains the primary member file, which includes the member application, placement and benefits selection documents. National Sex Offender Public Website (NSOPW) search results are a required part of the member file and are saved in a location overseen by the VMSU.

The VMSU maintains a physical member file which contains the Oath of Service. It can also include any correspondence maintained by the VMSU with the VISTA, as well as all documentation collected to establish an early termination for a compelling personal circumstance. Any medical documents collected to establish early termination for medical reasons must be kept in a sealed envelope.

Secondary Member File

The CSO creates and retains a secondary member file in the State Office to retain the teleservice agreement if applicable or official correspondence to and from the VISTA. The CSO destroys any correspondence when the VISTA member terminates.

Retirement of Member File

One calendar year after a VISTA's term of service ends, the VSMU retires the Primary Member File to the [Federal Records Center](http://www.archives.gov/frc/records-transfer-disposition.html) (<http://www.archives.gov/frc/records-transfer-disposition.html>). The Center maintains member files for seven years and then destroys them.

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Chapter 12: Grants

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Chapter 13: *Reserved*

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Chapter 14: *Reserved*

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Chapter 15: *Reserved*

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Chapter 16:

Criminal History Checks for VISTAs and Leaders

Chapter Owners: VISTA Criminal History Check Team

Effective Date: October 15, 2016

Reviewed: September, 2016

Overview of Criminal History Checks

The purpose of AmeriCorps VISTA's Criminal History Checks (VISTA CHC) is to support the safety of our service participants and beneficiaries. The policy and related procedures establish the method and criteria to review and evaluate criminal histories of VISTA applicants and members. The VISTA CHC is used solely to determine VISTA program eligibility for the duration of a member's service year. The results of a VISTA CHC should not be used in place of a criminal history check for any other program or organization.

The check involves a search of two databases:

- **Department of Justice [Dru Sjodin National Sex Offender Public Website](https://www.nsopw.gov/)** (<https://www.nsopw.gov/>) (NSOPW) – The CNCS State Office (CSO) conducts a search of this free online database for every VISTA and Summer Associate applicant.
- **FBI's Integrated Automated Fingerprint Identification System (AFIS)** – VISTA Headquarters conducts a comprehensive FBI criminal history search on the AFIS database for all full-time VISTA members by obtaining member fingerprints.

A step-by-step description of the process is in Appendix 16A.

In addition to VISTA CHC for members, staff members of a sponsor who receive any portion of their salary from an AmeriCorps VISTA grant are subject to a separate National Service Criminal History Check. VISTA alumni who become grant-funded staff on CNCS projects/grants cannot use their VISTA CHC to fulfill National Service Criminal History Check requirements. Please visit the National Service Criminal History Check Resources webpage for more information:

<http://www.nationalservice.gov/resources/criminal-history-check>

The VISTA CHC Team facilitates the process of tracking fingerprints, searching FBI records, and adjudicating members' criminal histories. Contact the VISTA CHC Team at VISTAfingerprint@cns.gov.

Conducting Department of Justice NSOPW Database Search

The CSO administering the project related to the VISTA and/or Summer Associate applicant conducts a database search on the Department of Justice [Dru Sjodin National Sex Offender Public Website \(https://www.nsopw.gov/\)](https://www.nsopw.gov/) (NSOPW) before approving the application.

After completing a search of the NSOPW and adjudicating any findings, the CSO saves the adjudicated findings and records these steps were taken via the portal by checking the appropriate box on the approval tab on the application submission screen for each candidate. For guidance on completing an NSOPR check, please review [“Instructions for Processing VISTA Member Actions for Corporation State Offices”](#) on the VMSU SharePoint page.

A VISTA or Summer Associate applicant’s appearance on NSOPW unequivocally disqualifies the applicant from service in the VISTA program.

If an applicant appears on the NSOPW, the CSO must verify that the member is indeed the person listed on the NSOPW results. If confirmed, the CSO must inform the Area Manager, OGC, and the VISTA HQ CHC team (VISTAFingerprint@cns.gov). After consulting with the appropriate parties, the CSO denies the application and informs the sponsor and applicant that s/he failed to meet VISTA’s legal requirements to serve via written correspondence.

Conducting FBI Criminal History Checks

VISTA conducts a comprehensive FBI criminal history check on all full-time members. VISTA does not conduct FBI criminal history checks on Summer Associates. Summer Associate host sites have the right to conduct a criminal history background check and follow the same onboarding process for the Summer Associates as they do for staff and volunteers.

The FBI criminal history check reflects, in varying degrees of comprehensiveness, whether an individual has a record of criminal arrests, citations, or convictions and, if so, the court’s disposition.

The FBI checks are conducted using paper fingerprint cards that are completed by the member. The CSO, provides sponsors with fingerprint kits. The sponsor then provides the member with a fingerprint kit no later than the first day of service. The member submits the completed cards to VISTA HQ, who in turn sends them to OPM. OPM is the FBI channeler of FBI background checks for federal agencies.

Members have several weeks (roughly one month) from their service start date to submit completed fingerprint cards. VISTA will provide a \$25 fingerprint subsidy to all members in an effort to offset fingerprinting costs. Members who fail to submit fingerprints by the deadline may be terminated (see *VDR Ch. 26: Termination of a VISTA and Deselection of a Candidate*).

Members who are unable to submit completed fingerprint cards by the stated deadline are able to request an extension by emailing VISTAfingerprint@cns.gov. These extension requests will be considered on a case-by-case basis by the VISTA CHC team.

The process of running the fingerprints through AFIS and the adjudication of criminal history reports may take several weeks. A VISTA candidate who successfully completes PSO may be sworn into service as a VISTA member although the FBI criminal history check is not yet completed; however, his or her continued service is conditional to their CHC review.

VISTA will only consider an FBI criminal history check that has been conducted specifically for the purpose of participating in the VISTA program. VISTA will not accept checks conducted in the past by other parties, including other CNCS programs.

Checks for Leaders, Re-enrollees, Reinstated Members, and Training Deferred Members

Leaders and re-enrollees with **no gap in VISTA service** and who have already undergone an NSOPW search and FBI criminal history check conducted by the VISTA program do not need to undergo a second FBI criminal history check or NSOPW.

Leaders and reinstated VISTA members with **a gap in service of 120 days or less** and who have already undergone an NSOPW search and FBI criminal history check conducted by the VISTA program do not need to undergo a second NSOPW or FBI criminal history check.

Leaders and reinstated VISTA members with **a gap in service greater than 120 days** are subject to a new VISTA criminal history check process. They receive a fingerprint kit from their sponsor no later than the first day of service.

Training Deferred Members and Leaders who have not gone through a VISTA CHC are subject to the criminal history check process. They receive a fingerprint kit from their sponsor no later than the first day of service.

Leaders with no prior AmeriCorps VISTA service are treated as new members and must undergo the VISTA CHC process.

	NSOPW	FBI CHC
Re-enrollee Member or Leader (no gap in service)	Not needed	Not needed
Reinstatement Member or Leader (less than 120 days gap in service)	Not needed	Not needed
Reinstatement Member or Leader (more than 120 days gap in service)	Needed	Needed
Deferred Member or Leader	Needed	Needed

(no CHC on file)		
Leader without prior AmeriCorps VISTA service	Needed	Needed

Criminal History Disclosure

When a VISTA candidate or member fails to fully disclose requested information regarding criminal history on his/her application, VISTA reserves the right to deselect a candidate or terminate a member from the program regardless of the nature of the history.¹⁶

In addition, if there is a significant discrepancy between the application and the results of the FBI criminal history check, the discrepancy is one element in considering whether termination for cause is warranted.

Applicants/Candidates are expected to disclose at the time of application. If a candidate discloses a criminal history on their application, during an interview or elsewhere, the CSO must complete a Criminal History Justification Form (CHJF) (Appendix 16C) and submit it to the VISTA CHC Team before accepting the member for service. The CSO should not accept an applicant who has disclosed a criminal history for service until the VISTA CHC Team has given approval.

The CSO completes the CHJF to provide justification that the member should be accepted for service despite the criminal history. VISTA CHC Team requires CSOs to provide relevant documentation, such as the full disposition of and conditions set by the court relative to any criminal case, letters of support, the capacity of the sponsor to satisfactorily supervise and the suitability of service given the applicant's skills where possible. If the CHJF requires additional information/documentation in order to adjudicate, the VISTA CHC Team will contact the CSO.

The VISTA CHC Team reviews the CHJF and additional documentation according to the VISTA criminal history adjudication guidelines detailed in the next section. The VISTA CHC Team provides an approval or denial to the CSO no later than 48 hours from date of receipt. If approved, the VISTA CHC Team sends the CSO an email approving the candidate. If the candidate is denied, the VISTA CHC Team provides the CSO, Area Manager and OGC the reason for denial. The VISTA CHC Team will document the CHJF action in the Clearance tab of the Portal and file in a secure location.

CSO should only submit a CHJF on candidates they approve for service.

Members have an additional opportunity to disclose a criminal history on the first day of service.

Sponsors provide members a fingerprint kit that includes a Member Disclosure Form (MDF) (Appendix 16D) on the first day of service. Members can use this opportunity to disclose a criminal history not previously disclosed in the application for whatever reason. The VISTA member sends this form directly

¹⁶ [45 CFR §2556.400 \(1\), \(5\) \(2016\)](#).

to the VISTA CHC Team who will adjudicate the disclosure according to the VISTA criminal history adjudication guidelines detailed in the next section.

The VISTA CHC Team will inform the CSO of any Member Disclosure Forms received and will instruct the member to inform their sponsor. Depending on the severity of the criminal history disclosed, the CSO may be required to complete a CHJF approving the member to serve despite the disclosed criminal history and the lack of disclosure at time of application.

If approved, the VISTA CHC Team will record the Disclosure Form and clearance status in the Portal. If denied, the VISTA CHC Team will follow proposed termination procedures mentioned in the Step-by-Step process (Appendix 16A) and detailed in Chapter 26: Termination of a VISTA and Deselection of a Candidate.

VISTA Criminal History Adjudication Process

The CSO adjudicates the NSOPW and documents the results in compliance with the [VMSU's Instructions for Processing VISTA Member Actions for Corporation State Offices](#) on the Intranet.

The VISTA CHC Team adjudicates all Justification Forms, Disclosure Forms and FBI reports and records the clearance status/decision in the Portal.

VISTA service suitability is determined on the basis of the following factors:

- Nature (severity) of the candidate/member's criminal offense
- Number of offenses in the history
- When an offense was committed
- Candidate/member's age at the time of the offense
- Relevant evidence of rehabilitation or the lack thereof
- Whether the candidate/member is currently on probation or parole*
- Candidate/member's candor in fully and accurately reporting requested criminal history information on the VISTA application
- Candidate/member's narrative response, if any
- Nature of the VISTA Assignment Description
- Sponsor's recommendation, coupled with the sponsor's ability to guide and supervise
- CSO's recommendation

A criminal history that would put a vulnerable population at risk warrants denial of the VISTA application, or immediate removal of the member from service, as appropriate. A vulnerable population includes children 17 years of age or younger, persons age 60 and older, and people with disabilities. Criminal histories warranting denial or terminal of service include, but are not limited to:

- Appearance on the National Sex Offender Public Website

- Past history of sexual abuse of children below age 18
- Conviction of any crime in which children were victimized
- Currently awaiting trial or on probation or parole. Only under unusual, extenuating circumstances shall VISTA consider an individual for VISTA service who is on probation or parole

*NOTE ON MINOR DRUG AND ALCOHOL-RELATED OFFENSES

Special consideration will be given to individuals who are awaiting trial or on probation for a single alcohol or drug-related offense (DUI, DWI, MIP, etc.). Consideration requires court documents and justification through the Criminal History Justification Form. The CHJF should include details of the probation, trial, etc.

If the VISTA CHC Team determines termination of service should be proposed, the CSO shall follow procedures for termination for cause, detailed in Chapter 26: Termination of a VISTA and Deselection of a Candidate.

Documentation for the Member File, Access, and Privacy

Documentation of a completed criminal history check for each VISTA applicant, candidate, and member consists of:

- NSOPW result
- FBI criminal history report
- Criminal History Justification Form (if appropriate)
- Member Disclosure Form (if appropriate)

CRIMINAL HISTORY FILE RETENTION

Per OPM, the FBI and the CNCS Personnel Security Unit guidance, the VISTA Program cannot archive or save FBI reports. FBI reports are used solely for the purpose of determining eligibility and are then destroyed. Conditions to this rule follow below.

Denied-Candidate and Early-Terminated-Member Criminal History Check Documentation: In the case of an applicant whose application has been denied or a member who has been terminated because of (1) the individual's criminal history, (2) failure to appropriately disclose requested information regarding criminal history on the individual's application and/or (3) by a sponsor's request, all available Criminal History Check documentation is held until the final determination to deny or terminate service. These records are filed at VISTA HQ in a secure location and destroyed in accordance with VISTA file retention policies.

Member NSOPW Results: NSOPW results are kept for the duration of the member's service year and then destroyed. The NSOPW results are stored according to VMSU guidance ([VMSU's Instructions for Processing VISTA Member Actions for Corporation State Offices](#) on the Intranet).

Member FBI Results: Records will be stored in a secure location at VISTA HQ and destroyed in accordance with VISTA file retention policies.

Member Criminal History Review Justification Form, Disclosure Form and Related Documentation: These records will be filed with the member's FBI report by VISTA HQ in a secure location and then destroyed 120 days after the member ends service.

ACCESS TO CRIMINAL HISTORY REPORTS

Only authorized CNCS personnel may have access to the FBI's criminal history reports and results of the National Sex Offender Public Website. NSOPW access is limited to the CSO staff responsible for the administration of the project, VISTA leadership, CHC team, and other CNCS staff with a need to know to perform official duties. FBI report access is limited to select VISTA CHC staff at HQ, VISTA leadership and OGC. FBI reports cannot and must not be shared with CNCS staff outside of HQ, including CSOs. FBI reports also cannot be printed or emailed for any reason. The reports can only be accessed electronically by authorized personnel.

All criminal history information and reports are confidential.

SHARING CRIMINAL HISTORY CHECK RESULTS WITH EXTERNAL ORGANIZATIONS AND SERVICE PARTNERS

The VISTA Program does not share the results of criminal history check information with third parties, such as a sponsoring organization. If an external organization or service partner poses questions concerning the criminal history check of any VISTA applicant, candidate, or member, the CSO may not provide specific information, but may state generally that the applicant, candidate, or member has or has not met VISTA service standards via the clearance letter (Appendix 16F). The Clearance letter can only be used for members during their year of service. CSOs cannot and must not alter the letter beyond that date, address, member name and service year. Editing the text of the letter will render it invalid.

Sponsors are encouraged to conduct their own criminal history checks on members. The VISTA CHC should not be used as a substitute check. The VISTA CHC solely certifies that the member has met VISTA's criminal history check baseline criteria.

VISTA Members Found to Have a Criminal History, Rendering Member Not Suitable After Starting Service

No Right to Reassignment: All members must successfully pass the FBI criminal history check. If VISTA/CSO determines that a member is not suitable to serve in the VISTA program or at the member's current placement site, the member has no right to be reassigned to another project.

VISTA Member Arrested During the Service Year

If a VISTA member is arrested during a service term, the member is required to report the arrest to the sponsor and CSO within three days of the arrest. Failure to do so may result in termination.

If a member is arrested at any time during service, the CSO informs the Area Manager (AM). If appropriate, the CSO may place the member on Administrative Hold status. If a final court ruling or final disposition of the matter does not occur within those 30 days, the State Director, in coordination with OGC, the VISTA CHC Team, and AM, determines whether to initiate termination proceedings of the member. The State Director may propose the member's early termination for cause because the member is not available to perform service duties and/or has exhausted his or her allowable absences.

If, within the 30 days, a final court ruling or other final disposition of the matter results in a conviction, the State Director, in coordination with OGC and VISTA, determines whether to initiate termination proceedings of the member.

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Chapter 17: VISTA Training and Professional Development Framework

Chapter Owners: VISTA Training Unit

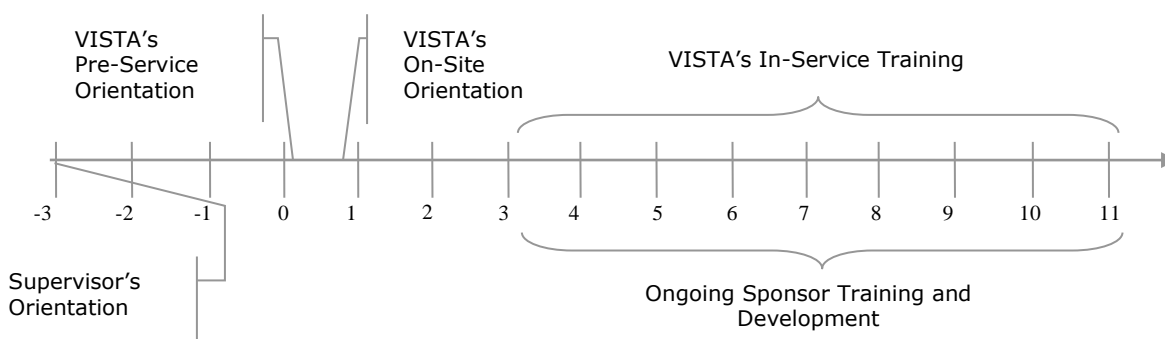
Effective Date: October 15, 2016

Reviewed: September, 2016

Overview of Training and Professional Development

The AmeriCorps VISTA Program provides training and professional development opportunities to VISTA members and VISTA supervisors throughout the year of service. These opportunities are formal and informal, group-based and individually focused, face-to-face and virtual, as well as written. The VISTA Program is committed to preparing the sponsor, supervisor, and VISTA member for service that results in sustainable programs and committed leadership.

Training Cycle (in months)



A VISTA's Training

A VISTA's training and development may be divided into three phases: Pre-Service Orientation (PSO) and On-Site Orientation and Training (OSOT) at the beginning of service; In-Service Training (IST) throughout the year; and Next Steps at the close of service.

PRE-SERVICE ORIENTATION

There are two versions with two distinct curriculums that VISTA uses to orient a candidate to VISTA service. The widely attended is a face-to-face model, which we often refer to as the Pre-Service Orientation (PSO) Classic. The alternative orientation is a virtual, distance learning model, which we refer to as the PSO Blend.

At a PSO Classic, a VISTA candidate receives a three-and-a-half day orientation immediately before he/she begins service. On rare occasions, a VISTA may begin service prior to attending the PSO; however, this is strongly discouraged. The decision to defer PSO orientation is made at the discretion of the Area Manager, and in some instances the VISTA Director or Deputy Director. (See Chapters 18A and 18B for full guidance.)

The aim of PSO is to ensure the VISTA candidate embraces the mission of VISTA; understands and accepts the terms, conditions, and benefits of VISTA service; has a general grasp of the state of poverty in America; and can relate the project assignment to eradicating poverty.

Throughout PSO, a candidate is encouraged to reflect on his/her commitment, consider the assignment, and raise questions with the trainers and with CSO staff who participate in and present at the orientation.

The PSO Blend curriculum incorporates self-directed (asynchronous) online tutorials, facilitated webinars, onsite training (designed and implemented by the sponsor), and action-learning on site and in the community.

Sequenced over a four-week period, the training develops knowledge and skills essential for success in VISTA service. The curriculum guides the VISTA through issues of legal and regulatory compliance, achieving the goals and objectives of the VISTA assignments, crossing the cultures of the organization and community, and managing their benefits and professional development opportunities.

ON-SITE ORIENTATION AND TRAINING

Immediately following Pre-Service Orientation, or concurrently if participating in PSO Blend, a VISTA is formally oriented to the assignment, sponsoring organization, and community by the project sponsor/supervisor. This On-Site Orientation and Training (OSOT) differs from the PSO in several important aspects. The PSO is most often conducted on a cluster-wide basis, presenting a national curriculum; whereas, the OSOT is presented by the project sponsor, and addresses the specifics of the project and the VISTA's assignment. The PSO is an intensive three-and-a-half-day training, employing professional facilitators and CNCS staff. The OSOT is a longer, slower paced training; is often informal (though should be no less methodical) in approach; and is implemented by co-workers, community members, and even directed by VISTAs themselves. The PSO orients an individual to the VISTA program and support system of CNCS; the OSOT prepares a member to serve effectively in the sponsoring organization and the target community.

The PSO design is based on the OSOT. The PSO prepares members to raise questions and issues with their sponsors during OSOT, with the aim of the member to glean as much as possible as quickly as possible upon arrival on site. Therefore, a thoughtful, methodical OSOT design is a key element to the success of the VISTA and the project. When approving a project, CSO staff review the sponsor's plans for OSOT and base their evaluation of the project's merits and potential for success on these designs. In a sense, the on-site orientation and training is the supervisory facet of the VISTA Assignment Description (VAD) that defines the VISTA's service for the year. The OSOT ensures the VISTA understands and is prepared to carry out his/her assignment, and helps identify areas where training or coaching is required.

IN-SERVICE TRAINING

In-Service Training (IST) is all training and development that occurs between the OSOT and the close of service. Several approaches exist for delivering in-service training to members, none of which is superior to another. An IST may be:

- Delivered on a state-wide basis by a CSO, with or without a community partner
- Delivered on a multistate basis, and may draw on the expertise of our Training and Technical Assistance (T&TA) providers
- Delivered by intermediary organizations that support several projects and have the capacity to deliver training
- Delivered on a project basis, funded through a grant (operational or Support Grant)
- Arranged for by the project but delivered by a training vendor outside our T&TA network
- Focused on an individual or a group
- A formal event, such as a conference, a workshop, a course, or an online course
- An informal event, such as coaching, mentoring, shadowing, or texts or articles

The principle underpinning the IST is that it addresses the VISTA's needs in carrying out the project assignment, that it be early enough to make a difference in the service year, and at an appropriate venue for members' learning styles.

PREPARING FOR LIFE AFTER AMERICORPS

This online interactive course is designed to be used throughout service, guiding a VISTA through self-reflection, with a goal to enrich service, strengthen the project, and inform his/her decisions on next steps after a year of VISTA service. The course is located at https://www.vistacampus.gov/Preparing_for_life_after_VISTA.

Sponsor/Supervisor Training

Sponsor training and development may be divided into two phases: Supervisors' Orientation (SO) prior to the arrival of the VISTAs on site; and on-going Training and Technical Assistance (T&TA), provided by CNCS T&TA providers and which may be offered in various forms and venues.

SUPERVISORS' ORIENTATION

New supervisors ideally receive this orientation three months prior to the VISTA members' arrival on-site, although in reality the training of the supervisor is sometimes concurrent with the training of the VISTA candidates assigned to that program.

The aim of this two-and-a-half-day orientation, usually conducted in tandem with a PSO, is to develop a supervisor's ability to effectively manage VISTA resources, i.e., the VISTA members, any grant money, and T&TA resources in place to support the project. Sessions address supervision and leadership in the context of VISTA and requirements in managing the project.

All new supervisors attend this orientation, including "subsite" supervisors in larger projects or under an intermediary, as well as supervisors who have replaced someone during the mid-project cycle.

TRAINING AND TECHNICAL ASSISTANCE

Training and Technical Assistance (T&TA) is available to all project sponsors and supervisors. T&TA is available via the following formats:

- Coaches and mentors
- Teleconferences with
 - Subject matter experts
 - Affinity groups
 - Coaches
- Webinars
- Workshops
- Institutes
- Conferences
- Curriculum design
- Facilitation

CNCS's portfolio of providers offer training and assistance in outreach and recruitment, member development, project management, resource development, performance measurement, grants management, management of training logistics, navigating eGrants, and programming under the faith-based and community initiative.

Online Training and Development Resources

Online resource materials and courses are available for VISTA members and sponsors/supervisors. The VISTA Campus offers mandatory courses, such as “Terms and Conditions of Service” and “Benefits of Service” for VISTAs and “Administrative Roles and Responsibilities of VISTA Supervisors,” as well as a host of courses, articles, training designs, forums, and tools addressing project management, supervision, member recruitment, development, and retention, resource generation, sustainable community development, employers and more. Sponsors and prospective members, VISTA Members, Leaders, Supervisors and Alumni all have a means to connect and discuss specific program issues and share resources.

Additionally, professional development webinars are offered to VISTA Members, Leaders and Supervisors on a range of professional and life-skill topics. The calendar of events is available on the [VISTA Campus \(https://www.vistacampus.gov/\)](https://www.vistacampus.gov/).

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Chapter 18A:

Managing Pre-Service Orientation (Classic) and Supervisors Orientation

Chapter Owners: VISTA Training Unit

Effective Date: October 15, 2016

Reviewed: September, 2016

Overview of Orientation for Candidates and Supervisors

Pre-Service Orientation (PSO), a face-to-face curriculum (referred to as PSO Classic¹⁷) is the first formal training for VISTA candidates about the VISTA program and their role as VISTA members. PSO is typically a three-and-a-half-day event, at the end of which candidates take the oath of service and enter service the following day. A sample agenda is available here: <https://www.vistacampus.gov/resources/sample-psy-agenda>. Training sessions develop candidates' knowledge regarding poverty, examine the impacts of poverty on communities and individuals, and explore theories of change. Additionally, PSO relates the AmeriCorps VISTA program's programming strategies to the VISTA candidate's VISTA Assignment Description (VAD) and builds the VISTA candidate's relevant skills.

From a broad perspective, PSO is an opportunity for VISTA candidates to consider the VISTA program's mission, regulations, policies, and terms and conditions of service, and to determine whether the program is a good fit for them. Equally, PSO is an opportunity for CNCS staff attending the event to observe a VISTA candidate's interaction throughout the orientation and assess their qualifications for VISTA service. If a VISTA candidate is deemed suitable, the individual takes the oath of service and is enrolled in the VISTA program. If a VISTA candidate is deemed unsuitable for service, or the VISTA candidate withdraws his/her candidacy, the individual leaves PSO, is deselected at the CNCS State Office (CSO) level, and is not enrolled in the VISTA program.

The VISTA program also conducts orientations for new supervisors. The Supervisors' Orientation (SO) is typically a two-and-a-half-day event that explores the VISTA program's missions, programming initiatives, and expectations of a supervisor. The SO develops a supervisor's ability to write a VISTA Assignment Description (VAD), effectively recruit VISTA candidates, design an On-Site Orientation and Training (OSOT), and coach the VISTA member throughout the year of service. The SO usually occurs at the same time and place as the PSO; however, the candidates and supervisors attend separate training sessions.

¹⁷ Assume that reference to PSO throughout this chapter is the face-to-face or "classic" model.

CNCS staff (VISTA HQ and CSOs), assisted by training consultants, conduct the PSO and SO. CSO staff assist with registration, offer welcoming remarks, present information on roles and responsibilities, and participate in the swearing-in. The PSO and SO take place regionally (by Cluster) at venues with appropriate meeting space. Not all PSOs have an associated SO. If no SO is scheduled in the cluster two months prior to their VISTA candidates attending PSO, the supervisor should be enrolled in the SO event that is closest geographically.

Calendar of Training Events

The Training Unit at VISTA HQ schedules training events each year based on data supplied by CSOs and Area Managers as well as historical data. Clusters may have as many training events as necessary to accommodate the projected number of new candidates. The process of scheduling the events, in coordination with the Area Managers, begins in September. The VISTA Training Unit posts the training calendar on the VISTA Intranet page during the first quarter of the fiscal year.

TRAINING COHORT SIZE

To ensure the orientations support learning and are logistically manageable, a cluster-wide PSO event ideally has a minimum of 60 and a maximum of 210 VISTA candidates. Supervisor Orientations should have 20 to 30 participants. Please note that facilitator and hotel contracts are negotiated months in advance based on projected training cohort sizes, and when actual numbers differ from projected numbers, contractor have the right to charge penalties for the difference.

The VISTA Training Unit uses the [Member Service Year](#) (MSY) charts, PSO Attendance Charts and previous years' PSO attendance to build the training calendar and predict class size. The actual number of trainees for a particular event becomes clear when the Portal enrollment period ends approximately 35 days in advance of the orientation. When the number of participants scheduled for an event reaches maximum capacity, the CSO must consult the VISTA Training Coordinator to explore what options are available for additional trainees.

Mandatory Attendance for VISTA Candidates and Supervisors

VISTA Candidates must attend PSO prior to starting service. In rare cases, compelling circumstances may require a VISTA candidate to begin service before attending a PSO; however, the PSO Blend curriculum was designed to avoid the need for Training Deferments. Please see the VDR Chapter on PSO Blend.

Generally, if it has been four years or less since a VISTA attended a PSO, the VISTA candidate need not attend a PSO again. However, this is not a hard and fast rule; the best course of action for an individual can be determined between the Training Coordinator and Program Officer.

New Supervisors, those who are responsible for the oversight of VISTA supervisors in a multisite/intermediary organization and those who are the sole supervisor at the single site project, are required to attend SO, ideally three months prior to their VISTA candidates attending PSO. Supervisors who have replaced previously trained, now-absent supervisors must also attend SO.

Subsite supervisors are also able to attend SO. Determination of which subsite supervisors need to attend and when they will attend will be determined, in coordination with the VISTA Training Unit, by CSO staff. CSOs should work directly with their VISTA Training Unit representative regarding the scheduling of attendance in these trainings. Sponsor representatives who are not required to attend SO (additional staff at the sponsoring organization) are welcome to attend SO at their own expense. CSO staff are responsible for contacting the VISTA Training Coordinator in charge of the event to ensure there is space at the venue, informing the sponsor of the logistical details of the SO (dates, location, etc.), and providing instructions for the sponsor to make his/her own hotel reservation and travel arrangements. The VISTA Training Coordinator may be able to arrange for the sponsor to get the group rate at the hotel. More information about Supervisors Orientation can be found in the Supervisor section of the VISTA Campus (<http://www.vistacampus.gov>).

Basic Steps to Prepare Candidates for Service

The VISTA Training Unit (VTU), VISTA Member Support Unit (VMSU), CNCS State Office (CSO), and the Sponsor/Supervisor are partners in positioning the VISTA Applicant/Candidate/Member for success.

1. Recruiting the Best Person for a Position

Recruitment begins with a Sponsor's well-crafted service opportunity listing in the Portal, optionally supplemented by announcements through other media. Go to <https://www.vistacampus.gov/resources/marketing-recruitment> for recruitment resources.

The VISTA program expects that the sponsor, through guidance and support of the CSO, will:

- interview individuals
- ensure the applicant reviews the VAD understands the assignment (see VAD below)
- review the essential terms and conditions of VISTA service, e.g.,
 - terms of commitment
 - living allowance
 - criminal history background: full self-disclosure
 - fingerprinting, i.e., obtaining prints and submitting the cards to VISTA HQ
 - benefits and their requisites
 - training

The VISTA program further expects that the sponsor has explored whether the applicant has a need for accommodation, or a criminal history that had not been shared on the application. If either

condition exists, the sponsor should alert the CSO as this may impact the applicant's eligibility and participation in training. *(Please see Special Needs section below.)*

1.a. VISTA Assignment Description (VAD)

Project sponsors should provide a VISTA Assignment Description (VAD) to each of their applicants during the interview, and well before the start of PSO. The VAD describes a VISTA's specific tasks and responsibilities with the project.

- Sponsors must submit the VISTA Assignment Description (VAD) to the CSO for review
- The CSO must ensure the tasks are reasonable and effective in the context of the project's objectives, and comply to policy and legal constraints
- Sponsors review the VAD with the applicant during the initial interview
- Sponsor and CSO confirm that the candidate/member has an up-to-date copy of the VAD for use during On Site Orientation and Training (OSOT) and PSO

A VAD that is valuable to the candidate and member is one that addresses the tasks for which the VISTA will be responsible, with rough timelines for the VISTA's year of service, and an indication of the sponsor's priority of those tasks.

A tutorial and sample VAD form is on the Supervisor's Page under "Life as a Supervisor," "The VISTA Assignment" on the [VISTA Campus \(https://www.vistacampus.gov/\)](https://www.vistacampus.gov/).

2. Enrolling a Candidate in the PSO

The Training Coordinator coordinates enrollment in the PSO.

Sponsors use eGrants to submit their recommended applicants for VISTA service to the CSO. The CSO uses the Portal (<https://my.americorps.gov/>) to approve an applicant for service and then places the VISTA candidate into the specific project. The CSO also uses the Portal to enroll the VISTA candidate into a scheduled PSO; the Portal automatically generates an email to the candidate confirming the enrollment and directs them to the [VISTA Pre-Service Coursework and Onboarding](https://www.vistacampus.gov/vista-pre-service-coursework-and-onboarding) page (<https://www.vistacampus.gov/vista-pre-service-coursework-and-onboarding>) of the VISTA Campus.

3. Travel Request Profile (TRP)

VISTA candidates attending PSO must complete a Travel Request Profile (TRP) in [my.americorps.gov \(https://my.americorps.gov/\)](https://my.americorps.gov/). This form provides information required for travel (PSO and/or relocation), lodging, accommodation of special needs (such as disabilities or translation), and emergency contact information. *(For a more detailed explanation of the process and timeline for completing the TRP, see "Training Enrollment and Travel Arrangements" below.)*

4. Special Needs—Physical Accommodation, Translation, and Other Accommodation

If a VISTA candidate has a need for physical accommodation, due to a vision or hearing impairment, limited mobility, or use of hands, for example, the candidate is expected to alert the Sponsor, CSO and/or VTU as soon as possible.

Attendants/assistants for the candidate may assist him or her throughout the PSO. The CSO should inform the Training Coordinator who will work to accommodate the person to the extent possible.

An individual designated as an attendant for the trainee may accompany the VISTA candidate or supervisor under the following conditions and to the following extent:

- The attendant is designated to assist the trainee with medical, cognitive, or accessibility needs
- The trainee must attend all sessions
- If required by the trainee, the attendant shall attend training sessions
- The CSO, if aware, informs the VISTA Training Coordinator at the 35-day deadline of attendant needs
- For VISTA candidates, the CSO instructs the trainee to fill out a separate TRP for the attendant. This form is available via a link at the bottom of the VISTA candidate's TRP
- For supervisors, the VISTA Training Coordinator works directly with the trainee to obtain travel information from the attendant
- The VISTA Training Coordinator arranges for and covers the costs of transportation, meals, training subsistence, and a double room for the trainee and attendant

If these conditions are not met, the trainee may not attend PSO or SO.

A spouse or partner who is not a caregiver may not share a room with the candidate or share meals with the training class.

5. Mandatory Portal "Paperwork" Prior to PSO

Once the CSO enrolls a candidate in PSO, the candidate will receive an email directing them to the [VISTA Pre-Service Coursework and Onboarding](https://www.vistacampus.gov/vista-pre-service-coursework-and-onboarding) page (<https://www.vistacampus.gov/vista-pre-service-coursework-and-onboarding>) of the VISTA Campus. This page links the candidate to the My AmeriCorps Portal (<https://my.americorps.gov/mp/login.do>) to complete the online on-boarding screens (paperwork): Direct Deposit, W-4, Unpaid Compensation, Life Insurance, End of Service Benefit (Education Award or Stipend). The email also links them to the required pre-service coursework to be completed on the VISTA Campus.

The VMSU sends an email to all candidates who have not completed all of the requisite paperwork prior to PSO and asks them to complete the items as soon as possible. The VMSU will also alert the CSO whether a candidate has not completed the requisite paperwork one week in advance of the start date. If CSOs receives an email indicating that a candidate has not completed all of the

requisite paperwork, the CSO should follow up with the sponsor and candidate immediately and ensure that the items are completed as soon as possible. Failure to complete the paperwork will prevent the candidate from starting service or receiving relocation support.

The sponsor should impress upon the candidate the importance of completing this paperwork as soon as possible. Incomplete paperwork and/or coursework will prevent the VISTA from starting service as planned.

CSO staff can view the status of all paperwork by running the “VISTA PSO Forms Check Report” for the event in which the candidate is enrolled.

6. Mandatory Online Coursework Prior to PSO Blend

Once the CSO enrolls a candidate in PSO, the candidate will receive an email directing them to the [VISTA Pre-Service Coursework and Onboarding](https://www.vistacampus.gov/vista-pre-service-coursework-and-onboarding) page (<https://www.vistacampus.gov/vista-pre-service-coursework-and-onboarding>) of the VISTA Campus. There, candidates are required to complete the Terms and Conditions course, the Civil Rights and Responsibilities course, Benefits of Service page, and Mission and Legacy of VISTA page. VISTA candidates should also read the online “[Information Packet](https://www.vistacampus.gov/lessons/ps0-welcome-packet?id=1575)” (<https://www.vistacampus.gov/lessons/ps0-welcome-packet?id=1575>) for details about PSO.

A good recruitment practice for sponsors is to review key terms and conditions of service with their applicants during the interview process. Sponsors may review the “[Terms and Conditions](https://www.vistacampus.gov/lessons/vista-terms-and-conditions)” course on the VISTA Campus (<https://www.vistacampus.gov/lessons/vista-terms-and-conditions>). The VMSU sends an email to all candidates who have not completed all of the requisite coursework prior to PSO and asks them to complete the items as soon as possible. The VMSU will also alert the CSO whether a candidate has not completed the requisite coursework one week in advance of the start date. If a CSO receives an email indicating that a candidate has not completed all of the requisite coursework, the CSO should follow up with the sponsor and candidate immediately and ensure that the items are completed as soon as possible. Failure to complete the coursework will prevent the candidate from starting service or receiving relocation support.

The sponsor should impress upon the candidate the importance of completing this coursework, like the portal paperwork, as soon as possible.

CSO staff can view the status of the Terms and Conditions course by running the “PSO Master List” for the event in which the candidate is enrolled in and looking under the “TCB” column.

7. Submission of Fingerprints

The CSO will ensure the sponsor has fingerprint kits before the VISTA members arrive on site. The kits contain print cards and directions on how to acquire print services as well as how and where to send those prints. Those prints must be received at VISTA HQ within 30 days of the VISTA member’s service start date. The member may request an extension if required. *For details, please refer to the VDR Chapter on Criminal History Checks.*

See Appendix 18A-1 for roles and responsibilities of all the training partners.

Enrollment in Training and Travel Arrangements

See Appendix 18A-1 for a step-by-step guide to enrollment and logistics procedures for the PSO and SO.

The VISTA Training Coordinator and the logistics contractor coordinate enrollment and travel arrangements for PSOs and SOs.

The CSOs have until 35 days prior to an orientation to enroll candidates into an event in the Portal. Supervisors enroll themselves in Supervisors Orientation through eGrants no later than 35 days prior to the start of the SO. A guide for supervisor registration is located on the “[Getting Started](https://www.vistacampus.gov/supervisors/getting-started)” (<https://www.vistacampus.gov/supervisors/getting-started>) page in the Supervisors’ section of the VISTA Campus. Supervisors also need to create a Trainee Profile in eGrants to document their SO travel needs. This should be done no later than 35 days prior to the SO. Approximately three weeks prior to SO, supervisors will receive more information regarding the logistics of the SO.

COMPLICATIONS WITH ENROLLMENT IN PORTAL: MANUAL ENROLLMENT FORM

In order to attend an upcoming PSO, all VISTA candidates must be identified on or before the 35-day deadline and be either (1) enrolled in the PSO via the Portal or (2) accounted for on a manual enrollment form (available on the VTU intranet page). VISTA candidates who cannot be enrolled in the Portal by the 35-day deadline must be recorded on the “manual enrollment form” and submitted to the training coordinator.

The manual enrollment is not a “late add sheet.” The manual enrollment form does not hold a space in the PSO for a yet-to-be-identified VISTA candidate. The manual enrollment form is used when a VISTA candidate cannot be enrolled via the Portal—typically because of an MA date conflict, a delay in SSN or citizenship verification, or waiting to complete an AmeriCorps State & National service term.

COMPLICATIONS WITH ENROLLMENT: RECRUITMENT AFTER DEADLINES/LATE REGISTRATION

The VISTA Training Unit recognizes that given the best recruitment efforts, an exceptional VISTA candidate might be selected after the 35-day deadline. Should an exceptional VISTA candidate or supervisor be identified after the 35-day deadline, the CSO should contact the Training Coordinator as early in the process as possible.

The VISTA Training Coordinator determines whether space is available, enough money has been obligated, and if ample preparation time for the candidate, VMSU, and logistician/travel agent exists. If yes, the VISTA Training Coordinator opens up appropriate slots in the PSO /SO event in the Portal.

Unless instructed otherwise, the CSO sends the electronic Information Packet copying the VISTA Training Coordinator.

In cases of late registration, the trainee (candidate, training deferred member, or supervisor) is often rushed, ill informed, and/or ill prepared. The VISTA Training Unit urges CSOs to ensure the trainee has time to:

- Receive his/her itinerary
- Prepare to travel
- Read the Information Packet
- Complete the online courses: Terms and Conditions course, the Civil Rights and Responsibilities course, Benefits of Service page, Mission and Legacy of VISTA page, and pass the Comprehension Check Quiz on the [VISTA Campus \(https://www.vistacampus.gov/\)](https://www.vistacampus.gov/)
- Complete online paperwork: Direct Deposit, W-4, Unpaid Compensation, Life Insurance, End of Service Benefit in my.americorps.gov
- Raise questions about the training and receive responses prior to the PSO

COMPLICATIONS WITH ENROLLMENT: NATIONAL CIVILIAN COMMUNITY CORPS (NCCC) MEMBERS BECOMING VISTA MEMBERS

Currently serving NCCC members (Corps members), if accepted to serve as a VISTA member, can easily transition into VISTA service. See the guidance below for transitioning a Corps member to VISTA service.

NCCC Service Term. Generally, a currently serving Corps member must complete their entire term of service, and their term of service must end at least one business day before VISTA Pre-Service Orientation (PSO). However, if a member has completed at least 1,700 hours of service and is exiting NCCC to meet “a window of opportunity” to serve as a VISTA member, the NCCC Regional Director can approve the member’s early departure. It is the Corps member’s responsibility to get this approval and submit it to the CSO.

PLACEMENT OF CORPS MEMBERS IN VISTA AND ENROLLMENT IN A PSO

Follow these steps when enrolling a currently serving NCCC member in a PSO:

1. Confirm with the regional director and get written documentation that the Corps member’s term of service will end at least one business day before PSO
 - a. If the Corps member’s term of service does not end at least one business day before PSO, confirm that the Corps member received approval for their early term of service departure
2. Ensure the MSS (NCCC Member Support Specialist) Office is aware that a current Corps member will be placed in VISTA term and enrolled in a PSO

- a. As soon as possible, but no later than 35 days before a PSO, the CSO contacts the NCCC Regional Director and MSS Office of the Campus where the Corps member is serving to confirm they are aware the member is starting a new service term with VISTA and that the Corps member will complete his/her NCCC service term prior to PSO
- b. MSS Office is responsible for exiting the member in the system and will assist with relocating the Corps member to his/her HOR or directly to PSO from Campus
3. If any system/portal issues arise due to overlapping service dates, the MSS should reach out to the NCCC Program Specialist at Headquarters
4. Notify the VISTA Training Coordinator as soon as possible if the placement or enrollment steps cannot be completed
 - a. There should not be a need to submit a 'manual enrollment list' since the VISTA candidate will be approved for VISTA service and placed/enrolled in the portal *prior* to the 35-day deadline *unless* the system/portal presents hurdles to placement and enrollment

TRAVEL FROM NCCC CAMPUS TO PSO TO VISTA PROJECT SITE

VISTA candidates who travel from their NCCC site to PSO and on to their VISTA project site should be classified as “relocation through.” The CSO should share the PSO arrival deadlines with the Corps member/candidate and MSS to ensure proper arrangements are made.

1. NCCC is responsible for the one-way travel from the NCCC site to PSO
2. The VISTA program is responsible for the one-way travel from PSO to the VISTA project site

TRAVEL FROM NCCC CAMPUS TO THE CANDIDATE’S HOR

VISTA candidates who return to their HOR before PSO will fall under the general PSO travel guidelines and be treated as either a relocating VISTA candidate or a non-relocating VISTA candidate.

1. NCCC will pay for the travel from the NCCC site to the VISTA candidate’s HOR
2. VISTA will arrange PSO travel and/or approve relocation plans according to standard VISTA travel and relocation policies

Arranging Travel: The Travel Request Profile (TRP)

Each VISTA candidate is responsible for completing the Travel Request Profile (TRP) in my.americorps.gov (<https://my.americorps.gov/mp/login.do>).

There are multiple TRPs in the Portal for VISTA Candidates to choose from. VISTA candidates select and complete the TRP that applies to them:

- Travel to Training

- For VISTA candidates and Leaders who will attend training and will not relocate to serve.
- Relocation Travel Only
 - For training deferred VISTA members who are relocating to start service. (Then, when this member attends PSO, he/she will complete a Travel to Training Only TRP.)
 - For reinstated VISTA members who are relocating to a new service site and will not attend training.
 - For VISTA members who are relocating to a new site in the middle of the service year.
- Training and Relocation Travel - For VISTA candidates relocating to serve and attending PSO.
 - Relocate prior, then roundtrip to training
 - Roundtrip to training, then relocate after
 - Attend training on the way to project site (relocating through PSO)

VISTA trainees should also verify that their my.americorps.gov account includes a current telephone number, email address, and mailing address to which itineraries and information packets are sent. VISTA trainees are locked out of editing their TRP once they are submitted. To make changes after this point, trainees should contact the VISTA Training Coordinator in charge of the event.

No later than 35 days prior to the training, the CSO must ensure all VISTA candidates have completed their TRP.

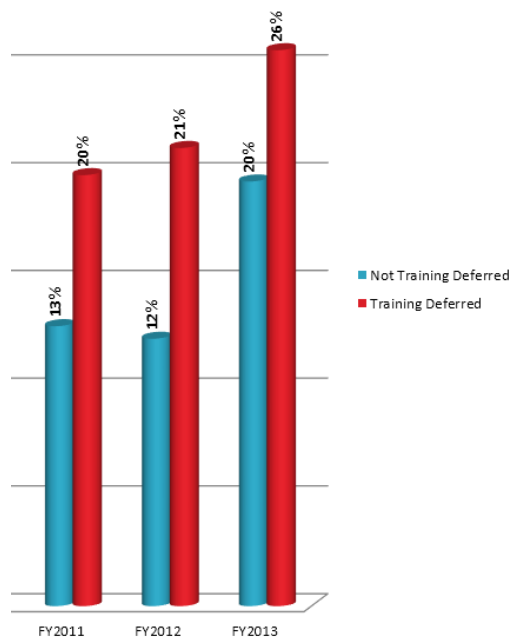
Arrival to and Departure from Training

For reasons of safety and well-being, the VISTA program does not require an individual to leave from home before 5:30 AM to arrive at an orientation. Similarly, the VISTA Program does not require an individual to return home from the PSO or SO later than midnight. The VISTA Training Unit may propose flights that fall outside of these departure and arrival times, and the individual may choose to travel outside of these departure and arrival times, but it is VISTA policy to consider a traveler's safety and to reasonably accommodate accordingly.

When departure or arrival time appears to be too early or too late, the logistics coordinator contacts the VISTA Training Coordinator to seek authorization to add days of travel to the itinerary. The VISTA Training Coordinator consults the VISTA candidate in making the decision. The VISTA Training Coordinator adds subsistence to the reimbursement voucher for the extra days; the rooms are covered through the hotel contract managed by the VISTA program.

In the event of flight cancellations, bad weather, etc., occasionally, a VISTA candidate or supervisor may need to stay an extra night in the hotel. The logistics and travel contractor makes lodging arrangements at the training site (or a hotel near the airport). VISTA candidates and supervisors may receive additional subsistence. The logistics and travel contractor informs the VISTA Training Coordinator (even after the

event) of anyone who was required to stay another night. The VISTA Training Coordinator informs the CSO, VMSU, and the Field Financial Management Center (FFMC), and requests that extra subsistence be added to the voucher. If a VISTA candidate contacts the VMSU directly about extra subsistence, the VMSU contacts the VISTA Training Coordinator to verify the circumstances warranting additional subsistence.



Training Deferrals (for PSO)

Training deferrals of any type are strongly discouraged. To avoid the need for training deferrals, the PSO calendar has been developed in consultation with OFL to ensure frequent PSO Classics and PSO Blends throughout the year.

VISTA attrition data (left) demonstrates that training deferred candidates early terminate at a higher rate than candidates who attend PSO before starting service.

In the unlikely event that a training deferment of two weeks or less is requested due to extenuating circumstances, the CSO must submit the request to the Area Manager for approval. If approved by the Area Manager, the Area Manager must notify the VISTA Training Director and include the following:

1. A detailed justification of why the training deferment is needed
2. What other options have been explored to avoid the deferment
3. The ramifications of not approving the request
4. Assurance that the candidate can and will attend the next available PSO Classic event
5. Assurance that the CSO will ensure the training-deferred VISTA is properly on-boarded and oriented to VISTA.

Training deferment requests of more than two weeks are extremely rare and must be approved by the VISTA Director. Those requests must be submitted in writing by the Area Manager to the VISTA Director (copying the Training Director) and include the same information as listed above (#1-5).

The VISTA Director will review the request and notify the Area Manager whether or not the request is approved. The CSO should not notify the project or candidate of the official start date until they hear back from their Area Manager. A lack of follow-through or responsiveness on the parts of the candidate or sponsor is not a compelling circumstance to authorize a training deferment.

Training deferrals should not be pursued for candidates participating in PSO Blend. Please see Chapter 18B: Managing Pre-Service Orientation Blend for more information.

PLACEMENT AND ENROLLMENT FOR A TRAINING DEFERMENT

The sequence required for the approval, onboarding, and activation of training deferred candidates is outlined below. By following this process, the CSO ensures the VISTA candidate begins service with (1) appropriate approval; (2) an NSOPW check; (3) adequate knowledge regarding terms, conditions, benefits, etc.; (4) PSO enrollment; (5) completed forms and online coursework.

- Approval
 - Less than two weeks – Area Manager must notify VISTA Training Director at least ten (10) business days in advance of the proposed start date (see above)
 - More than two weeks – Area Manager requests approval from VISTA Director at least ten (10) business days in advance of the proposed start date (see above)
 - The VISTA Director will review the request and notify the Area Manager whether or not the request is approved.
- Criminal History Check and Fingerprinting (Review Chapter 16: Checks for Training-Deferred Candidates for complete guidance related to NSOPW and fingerprints.)
 - The NSOPW check must be completed and the results sent to the VMSU prior to the candidate’s service start date
 - The CSO and Sponsor supply finger print cards and instructions to the candidate who must submit fingerprints to VISTA HQ within 30 days of his/her start date
- PSO Enrollment
 - The CSO, in coordination with the VISTA Training Coordinator, ensures the training deferred VISTA attends the earliest and most cost effective PSO available (which might be out of cluster)
 - If PSO travel costs increase significantly as a result of the training deferment approval, the sponsor may be responsible for booking and paying for the candidate’s PSO travel
 - The VMSU will review relocation travel and approve the most cost effective routing

ONBOARDING A TRAINING DEFERRED VISTA CANDIDATE

Complete the following steps on or before the VISTA candidate’s first day of service.

1. VISTA Terms and Conditions, Benefits Review

- a. The CSO provides a “mini PSO” in person or via phone to review the terms and conditions as well as benefits of service. The “Navigating Your Year of Service” presentation is available via the Cluster Training Coordinator
- b. The VISTA candidate must complete the Terms and Conditions course on the VISTA Campus and certifies their acceptance of the VISTA Terms and Conditions in their my.americorps.gov account prior to arriving on site.

- i. Candidates who do not have this completed prior to their first day of service cannot start service as scheduled and should not report to their site.

2. Coursework and Forms

- a. The CSO verifies the VISTA candidate completed the following “Starting VISTA” online courses available via the VISTA Campus (<https://www.vistacampus.gov/vista-pre-service-coursework-and-onboarding>)
 - i. VISTA Terms and Conditions – required
 - ii. Benefits of Service – required
 - iii. VISTA Civil Rights and Responsibilities – required
 - iv. Mission and Legacy of VISTA – required
 - v. Comprehension Check Quiz – required
 - vi. VISTA Child Care Benefit Tutorial – if applicable
 - vii. Education Award Website – if applicable
 - viii. VISTA Child Care Benefit Tutorial – if applicable
- b. The CSO verifies the VISTA candidate completed the following online forms via [My.AmericCorps.gov](https://my.americorps.gov) (<https://my.americorps.gov/>)
 - i. Direct Deposit Information
 - ii. Federal Tax Withholding (W-4)
 - iii. Unpaid Compensation Information
 - iv. Life Insurance
 - v. End of Service Benefit Election
- c. Oath
 - i. The CSO administers the oath in person or via phone and ensures the VISTA candidate properly signs and dates the [V-55 Oath Form](http://portal.cns.gov/Portals/0/AmeriCorps%20VISTA%20Oath%20Form.pdf) (<http://portal.cns.gov/Portals/0/AmeriCorps%20VISTA%20Oath%20Form.pdf>)
 - ii. The VISTA candidate should immediately email a scanned copy of the oath to the CSO
 - iii. Upon receipt of signed oath, the CSO countersigns and dates the oath and emails a scanned version to the VMSU for activation. (See “Requirement to Take the Oath or Affirmation of Service” later in this chapter.)

3. PSO Attendance

- a. The CSO must set the following expectations with the training deferred VISTA candidate regarding PSO
 - i. The VISTA member will attend the next available PSO Classic event
 - ii. The VISTA member must abide by the same standards of behavior and session attendance as other trainees at PSO. (See “Improper Conduct at Training” later in this chapter.)
 - iii. The VISTA member will attend and participate in the induction ceremony during PSO, but should not sign another oath form

4. Activation

- a. The following documents must be submitted on the VISTA candidate's first day of service to the VMSU for activation:
 - i. Oath form signed, dated, and countersigned by the CSO
- b. Once the VMSU receives the required documents, activation will occur no later than five business days

The Pre-Service Training Models

CLUSTER-BASED PSO AND SO EVENTS

The VISTA Training Unit manages and implements PSOs and SOs on a cluster-wide basis. However, the VISTA Training Unit may elect to send a VISTA candidate or member to a PSO outside of the cluster (e.g., when travel is more cost-effective). In addition, in some instances, it is cost-effective to conduct a state-based or sub-regional PSO to reduce travel costs (see the next section).

While administered from VISTA HQ, the PSO and SO are conducted through a partnership between the VISTA Training Unit, the CSO, the VMSU, and the training and logistics providers. (See Appendix 18A-1 for roles and responsibilities of training partners.)

Locations of the training events are updated in the staff version of the [Staff Portal \(https://espan2.cns.gov/\)](https://espan2.cns.gov/) and on the calendar of training events posted on the [State Office area of the VISTA Campus and the VISTA Intranet \(http://portal.cns.gov/CNCSDepartments/DepartmentoftheChiefofProgramOperations/-OfficeofAmeriCorpsVISTA.aspx\)](http://portal.cns.gov/CNCSDepartments/DepartmentoftheChiefofProgramOperations/-OfficeofAmeriCorpsVISTA.aspx) page. The Portal is the definitive source for locations, dates, and deadlines.

LOCALIZED PSO AND SO EVENTS

Training needs often are addressed better in smaller, focused groups. Reducing the size of the PSO, localizing the Orientation to a state or multistate area, or engaging intermediary sponsors to orient members, allows tailoring of the curriculum to the VISTA candidates. Localized training events can also reduce travel costs. More localized training affords the opportunity to better:

- Address the character of the communities in which the VISTA candidates will serve
- Explore the nature of the sponsoring organization and the VISTA candidate's place in that organization
- Include VISTAs candidates and the sponsoring organization staff in training sessions
- Review in greater detail the VISTA Assignment Description (VAD)

Localized training also supports the AmeriCorps VISTA philosophy that:

- Communities hold resources that can be utilized in developing the project
- Community partners offer information and skills from which VISTA candidates can learn

CSO staff interested in conducting a localized training (PSO or SO) should contact the Director of Training at VISTA HQ. Training teams can adapt the national curriculum to accommodate cross-program opportunities and other local needs, as long as the budget is not exceeded and core-learning objectives are met. The VISTA Training Unit will assist, if needed, in logistical arrangements, curriculum design, facilitation, and on-site management through its network of Training and Technical Assistance providers. Localized events must have a minimum of 30 participants to be cost-effective.

Note: When an organization outside of CNCS conducts a PSO, a CSO staff member must be present to present information on VISTA terms, conditions and benefits; respond to CNCS-related questions; evaluate the suitability of the candidates; and administer the oath.

THE PSO BLEND

An alternative to the PSO, the PSO Blend curriculum incorporates self-directed (asynchronous) online tutorials, facilitated webinars, onsite training (designed and implemented by the sponsor), and action-learning on site and in the community.

Sequenced over a four-week period, the training develops knowledge and skills essential for success in VISTA service. The training requires no travel, has shorter deadlines than the PSO (Classic), and can be expanded to meet a large number of trainees.

In order to participate, a person (Candidate and Member) must have reliable access to the internet (connectivity) and telephony (VOIP, landline or cell phone service), a high-school equivalence of English language proficiency¹⁸, adequate equipment (laptop or desktop computer), and, comfort with computer-based, distance learning.

The syllabus requires a space where a participant can easily hear, follow on screen, and respond verbally and in writing. These expectations should be shared with the sponsor and the candidate. The sponsor should also understand that PSO Blends require additional time from the supervisor to ensure the members are submitting assignments on time and attending sessions when scheduled. If these minimum requirements and expectations cannot be met, the face-to-face PSO will better serve the candidate and the sponsor.

For more information about PSO Blend and the processes and expectations related to PSO Blend, please see Chapter 18B: Managing Pre-Service Orientation Blend.

¹⁸ A Spanish version of the PSO Blend curriculum will be developed at a later point.

ADD-ON MEETINGS OR TRAININGS

Occasionally, sponsoring agencies, supervisors, and/or CSO staff request supplemental meetings or training days for their VISTA candidates during or immediately following PSO. These sessions may be scheduled in the evening during PSO or on the day(s) following PSO, but not prior to PSO. **Under no circumstances may these events conflict with the PSO schedule.**

CSO staff should notify the VISTA Training Unit of any additional training plans as soon as possible (but no later than 30 days in advance of the PSO). The VISTA Training Coordinator will facilitate changes to travel and lodging, if necessary. The VISTA Training Coordinator will also facilitate hotel arrangements with the logistics contractor and accommodate (to the extent possible) the sponsor meeting with and training the VISTA candidates. VISTA will not, however, take responsibility for the sponsor's meeting(s) or absorb any additional costs related to travel, logistics, or coordinating the sponsor's trainers.

The VISTA program is not responsible for additional charges (e.g., meeting room rental, audio-visual equipment rental, meals, refreshments, additional night's lodging, etc.) related to these meetings and trainings. The sponsor is responsible for contracting with the hotel or training venue for these additional services and for covering the associated costs. **The sponsor and/or CSO must notify the VISTA candidates in advance about the add-on meeting.**

The VISTA Training Unit recommends that evening add-on meetings conclude by 8 p.m. For PSOs that begin on Monday, evening sessions can only be scheduled on Tuesday or Wednesday. A PSO that begins on Tuesday can only accommodate add-on sessions Wednesday or Thursday evenings. Add-on training that occurs after PSO should start no earlier than 2:00 p.m. on the final day of PSO to allow participants time to complete close-out and have lunch.

Attendance at PSO

CANDIDATES OF NATIONAL, MULTI-SITE, AND MULTI-STATE PROJECTS ATTENDING PSO

Generally, locally recruited VISTA candidates attend PSO and serve in the cluster that manages their project; and nationally recruited VISTA candidates will attend PSO in either the cluster where travel originates (i.e., home of record) or in the cluster where travel concludes (i.e., service site). However, the VISTA Training Unit may elect to send a VISTA candidate to any PSO for reasons related to cost, space, timing, or unforeseen circumstances.

Sponsors may request that candidates for national, multisite, and multistate projects attend the same PSO and be trained as an "intact group." When a sponsor requests that a VISTA candidate attend a PSO that the VISTA candidate would not otherwise attend, the sponsor must book and pay for all travel and follow PSO arrival and departure guidelines. The VISTA program covers travel for VISTA candidates that

either (a) live and serve in the same cluster as the PSO or (b) will relocate and either begin or end their travel in the same cluster as the PSO.

If the sponsor wishes to have dedicated training time with the project's VISTA candidates, such training can occur at PSO but must not interfere with the regular PSO sessions. (For details regarding add-on trainings, please review the "Add-On Meetings or Trainings" section earlier in this chapter.)

LOCAL CANDIDATES AND SPONSORS COMMUTING TO PSO AND SO

VISTA policy discourages VISTA candidates and supervisors who live near the training site from commuting between their home and the hotel. The commute is often a distraction from the learning and sharing experience during the PSO and SO, and increases risk of tardiness due to traffic. If a VISTA Training Coordinator and CSO determine it is in the best interests of the VISTA program for an individual to commute, it is permissible under the following conditions:

- The individual attends all sessions in their entirety; late arrivals and early departures due to traffic and other non-compelling reasons for absence are grounds for deselection
- The individual is reimbursed for one round-trip only (home to training facility) and for parking. Participants who travel less than 50 miles and do not stay overnight are not entitled to receive reimbursement for incidental expenses (what we call "training subsistence"), per Federal travel regulations

FAMILY MEMBERS AND ATTENDANTS ACCOMPANYING PARTICIPANTS AT PSO AND SO

VISTA candidates and supervisors are expected to focus on learning and interacting with the training class at PSO and SO. For this reason, the VISTA program does not allow family members (including spouses, partners, and dependent children) to accompany trainees to PSO and SO.

Dependent children and their child care provider may accompany the trainee only when all options for alternative care have been exhausted. To arrange for a child and child care provider to accompany a trainee to PSO or SO, the CSO, having explored all options with the trainee, contacts the VISTA Training Coordinator to ensure there is room at the hotel for an additional person.

If a child and the care provider must accompany the trainee to PSO or SO, then the VISTA program will support the trainee under the following conditions and to the following extent:

- The child is legally the trainee's dependent and under age 18
- All transportation (including ground transportation to/from airports or train/bus stations) for the child and the care provider is the sole responsibility of the trainee
- All meals for the child and the care provider are the sole responsibility of the trainee

- Neither the child nor the care provider may attend training sessions or disrupt the PSO or SO in any way
- The trainee must attend all sessions
- The VISTA Training Coordinator will arrange for and cover the costs of a double room for the trainee, child, and care provider

SPONSORS ATTENDING PSO

Sponsor representatives who are not enrolled in the SO are welcome to attend and observe PSO at their own expense. CSO staff are responsible for informing the sponsor of the logistical details of the PSO (dates, location, etc.) and providing instructions for the sponsor to follow in making his/her own hotel reservation and travel arrangements.

If the sponsor recommends changes to the curriculum to accommodate its attendance or to address its VISTA candidates better, CSOs should raise these recommendations with the Director of Training to ensure that the national curriculum maintains consistency of quality and message. (Please see “Add-On Meetings or Trainings” in the section on Cluster-Based PSO and SO Events, above.)

VISTA’s Expectations and Requirements of PSO Participants

IMPROPER CONDUCT AT TRAINING

If participants at the PSO or SO do not participate in training sessions or if they engage in behavior that is disruptive, unprofessional, or otherwise inappropriate, the VISTA Training Coordinator or VISTA representative, after consultation with the CSO, may deselect that person from service and send them home immediately. Depending upon the circumstances, the cost of travel, hotel, training subsistence, and other associated expenses may be charged to the candidate. (See Chapter 26 for guidance on termination and deselection.)

MEDICAL EMERGENCY AT PSO

In the event of a medical emergency, a staff person on site (the VISTA Training Coordinator, CSO staff person, or logistics coordinator) assists in calling 911. If not life threatening, the staff person arranges for a taxi or hotel shuttle through the hotel. A staff person must accompany the individual to the hospital emergency room. If the VISTA candidate does not have health insurance, the staff member contacts the VMSU, which then contacts International Medical Group (IMG) to arrange for payment for the emergency medical service and a health benefits card (to be faxed to either hotel or hospital).

International Medical Group’s toll-free number is 1-855-851-2974.

When a VISTA candidate must be admitted to a hospital prior to contacting IMG, the VISTA candidate may request the hospital to bill their home address, and then later submit IMG's health coverage information to the hospital.

If a VISTA candidate seeks emergency healthcare assistance from the VISTA program, and later cannot provide proof of insurance or exemption from the requirement, they may be subject to removal from the VISTA program and are responsible for all charges. However, VISTA candidates may rely on the AmeriCorps VISTA Health Benefit Plan during the first 60 days of service if necessary. VISTA candidates have 60 days from their service start date to obtain other insurance and submit proof of insurance to IMG. (See VDR Chapter 24, Health and Child Care Benefits for additional information.)

Requirement to Take the Oath or Affirmation of Service

As a condition of entry into service, VISTA candidates are required to take the same oath or affirmation as individuals entering federal employment, as set forth in the Domestic Volunteer Service Act of 1973, as amended, VISTA's authorizing legislation.

Although all VISTA candidates must take this oath, a candidate may either "swear" or "affirm" to uphold the conditions of service, and may, if they so choose, omit the phrase, "So help me God."

A CNCS representative administers the Oath or Affirmation of Service, which is printed on the AmeriCorps VISTA Oath Form and included in each candidate's packet of PSO training materials. The oath form is signed and dated by the VISTA and witnessed by a CNCS staff member. A copy of the AmeriCorps [Form V-55 Oath Form](http://portal.cns.gov/Portals/0/AmeriCorps%20VISTA%20Oath%20Form.pdf) (<http://portal.cns.gov/Portals/0/AmeriCorps%20VISTA%20Oath%20Form.pdf>) is available on the VISTA Intranet page under member forms.

ALTERNATE OATH FOR LEGAL RESIDENTS (NON-CITIZENS)

A VISTA candidate who is not a U.S. citizen or a U.S. national but who legally resides within a state (someone who is a permanent legal resident or otherwise a legal resident of a state) must take the alternate oath of service, as set forth in the Domestic Volunteer Service Act of 1973, as amended.

This alternate oath of service and the alternate AmeriCorps VISTA Oath Form are available through the training team on site. A CNCS representative administers this alternate oath and the form is signed and dated by the VISTA candidate and witnessed by a CNCS staff member. The VISTA candidate does not sign the AmeriCorps VISTA Oath Form.

ALTERNATE OATH FOR RELIGIOUS REASONS

On rare occasions, a VISTA candidate may object to taking the oath of service, as set forth in the Domestic Volunteer Service Act of 1973, as amended, for religious reasons. In such cases, the VISTA candidate takes an alternate oath of service for religious reasons.

If a VISTA candidate states that s/he cannot pledge, swear, or affirm allegiance to any country, flag, or political institution for religious reasons, the candidate may take the alternate oath for religious reasons. If a VISTA candidate states that for religious reasons s/he cannot swear or affirm to defend the United States against any enemies, foreign or domestic, the candidate may take this alternate oath. Allowing a VISTA candidate to take the alternate oath for religious reasons is in accordance with applicable federal law and regulations prohibiting religious-based discrimination in federally conducted programs such as VISTA.

A CNCS representative administers the alternate oath and the form is signed and dated by the VISTA candidate and witnessed by a CNCS employee. The VISTA candidate does not sign the AmeriCorps VISTA Oath Form. Alternative oath form is available here: <https://cnsgov.sharepoint.com/sites/VISTA/VMSU>

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Chapter 18B:

Managing Pre-Service Orientation Blend

Chapter Owners: VISTA Training Unit

Effective Date: October 15, 2016

Reviewed: September, 2016

Overview of the Virtual Orientation for Candidates

The Pre-Service Orientation (PSO) Blend curriculum incorporates self-directed (asynchronous) online tutorials, facilitated webinars, onsite training (designed and implemented by the sponsor), and action-learning on site and in the community.

Sequenced over a four-week period, the training develops knowledge and skills essential for success in VISTA service. The curriculum guides the VISTA through issues of legal and regulatory compliance, achieving the goals and objectives of the VISTA assignments, crossing the cultures of the organization and community, and managing their benefits and professional development opportunities.

In order to participate, a person (Candidate or Member) must have reliable access to the internet (connectivity) and telephone (VOIP, landline or cell phone service), a high-school equivalence of English language proficiency¹⁹, adequate equipment (laptop or desktop computer), and, finally, comfort with computer-based, distance learning.

While our systems are built in a responsive architecture which supports smartphones and tablets, the VISTA Training Unit does not recommend attempting to complete onboarding screens in My.AmeriCorps.gov (Portal), the tutorials in [VISTACampus.gov \(https://www.vistacampus.gov/\)](https://www.vistacampus.gov/), or attending the webinars on a smartphone or other mobile device. The Portal screens and coursework are too complex for a small screen. Additionally, public spaces—cafes, streets, lobbies—have not proven to be conducive to participating on webinars. The syllabus requires a space where a participant can easily hear, follow on screen, and respond verbally and in writing. These expectations should be shared with the sponsor and the candidate. If these minimum requirements and expectations cannot be met, the face-to-face PSO will better serve the candidate and the sponsor.

AmeriCorps VISTA HQ coordinates with contracted facilitators, CNCS State Offices (CSOs), and supervisors to implement the following syllabus:

¹⁹ A Spanish version of the PSO Blend curriculum will be developed at a later point.

1. Self-directed (asynchronous) VISTA Campus courses: Terms and Conditions; Benefits; Civil Rights and Responsibilities; VISTA's Mission and Legacy; Using the Education Award; Child Care Support (if applicable)
2. Comprehension Check ensuring an understanding of essential concepts and conditions
3. Formal Welcome; Navigating the VISTA Year of Service (a review of program principles, benefits, theory of change, and support systems); Overview of first month of service; Swear-In. Action learning tasks (essentially homework assignments) regarding community and VAD are assigned for follow up
4. On-Site Orientation and Training (OSOT) and VISTA Assignment Description (VAD) review with supervisors
5. Online forums for each classroom, with an option for the Member to contact the CSO to address pressing project issues, or with facilitators to address action-learning items
6. Feedback on action-learning items; introduction to VISTA Campus and American Council on Education (ACE) accredited Specific Personalized Online Courses (SPOCs); action learning item regarding "elevator speech" and marketing of the project
7. Online tutorials/courses, with facilitator input and feedback, on Poverty Measurement, Asset Mapping, Appreciative inquiry

Candidates must complete Portal paperwork and online coursework prior to their arrival on site. Once at site, on the member's first day of service, the formal welcome to AmeriCorps VISTA and the oath of office are administered via webinar. The PSO Blend continues through webinars, coursework, forum discussions and "homework" in the field for approximately four weeks.

Calendar of Training Events

The VISTA Training Unit schedules training events – both PSO Blends and the PSO face-to-face events – each year based on projections in the Member Service Years (MSY) charts in collaboration with the Area Managers.

The first day of PSO Blend will be held at the beginning of a pay period, which will also be the first day of service for the member. PSO Blend events are scheduled frequently to ensure candidates are brought onboard with little or no delay.

The Training Unit posts the training calendar in the State Office section of the VISTA Campus and on the [VISTA Intranet \(http://portal.cns.gov/CNCSDepartments/DepartmentoftheChiefofProgramOperations/-OfficeofAmeriCorpsVISTA.aspx\)](http://portal.cns.gov/CNCSDepartments/DepartmentoftheChiefofProgramOperations/-OfficeofAmeriCorpsVISTA.aspx) page. The Portal is the definitive source for locations (recorded as "virtual" for the PSO Blend), dates, and deadlines.

TRAINING CLASS SIZE

While a PSO Blend event does not have an enrollment “ceiling,” it is important the orientation supports learning and is logistically manageable. A PSO Blend event cohort can be broken down into virtual classrooms and can be designated by state(s) or projects.

MANDATORY ATTENDANCE OF CANDIDATES/MEMBERS

The VISTA Program expects all candidates to fully participate and complete all aspects of the four-week syllabus of the PSO Blend—asynchronous online tutorials, webinars, onsite learning activities, and forums. Emergency absence will be addressed on a case by case basis.

REQUIREMENTS IN ORDER TO BE ACTIVATED FOR SERVICE

The Candidate must complete the Portal onboarding screens and the mandatory compliance training online by the start date. While we urge every candidate to complete this work prior to the first day at site, Candidates will have 24 hours after the “Launching Your VISTA Service” webinar to complete everything and submit their oath forms. A Candidate will not be activated without all Portal screens, all coursework, and an oath form completed and submitted. A Candidate is ineligible to receive a living allowance until s/he has been activated.

ABSENCE FROM WEBINARS, MEET-UPS, AND MISSING ASSIGNMENTS

All PSO Blend live sessions and fieldwork assignments are mandatory and essential to the candidate’s training for VISTA service. Failure to attend all live sessions and complete all fieldwork on-time can result in removal from VISTA service.

INAPPROPRIATE BEHAVIOR

If a member engages in behavior that is disruptive, unprofessional, or otherwise inappropriate, then the CSO, in coordination with the Training Coordinator, will determine if the VISTA is able to continue in the PSO Blend or should be removed from VISTA service.

(See Chapter 26 for guidance on termination and deselection.)

RE-ENROLLED OR RETURNING VISTAS

A re-enrolled or returning VISTA need not attend a PSO or PSO Blend again unless the CSO deems it necessary or in the best interest of the project or program. If a CSO does determine that a Candidate should attend a PSO Blend for a second time, e.g., because the person is returning after more than four years, the CSO should alert the Training Coordinator of that need so that the candidate is not removed from the event.

VISTA's Partnership with the CSO throughout the PSO Blend

The VISTA Blend offers opportunities and responsibilities that are different from the classic PSO model. The PSO Blend can serve as a safety net to ensure projects are able to onboard trained members with little or no delay. The PSO Blend also offers an alternative to those candidates for whom travel and attendance at a face-to-face PSO is difficult or impossible.

It is the CSO's role to ensure that a candidate meets the requirements to participate in the PSO Blend. No one should be placed in a PSO Blend without first confirming that a Candidate's:

- Language skills are adequate,
- Internet connectivity is strong and reliable,
- Service environment is conducive to distance learning,
- Access to the internet is more than a smartphone to complete the syllabus,
- Sponsor and supervisor can support the four-week syllabus in terms of
 - Furnishing a work station,
 - Adjusting the member's schedule to participate,
 - Implementing an onsite orientation & training (OSOT)
 - Reviewing the candidate's VAD
 - Supplying an oath form and fingerprint cards

Failure to ensure the Candidate, Sponsor and Supervisor meet these requirements and are well informed can require costly remediation and must be avoided.

Given the design of the four-week syllabus, unlike a classic PSO, the participant in the PSO Blend is a Member, not a Candidate. A Training Coordinator cannot enforce policy and remediate behavior as s/he would on site at a PSO, and cannot suggest to the CSO deselection based on observed behavior. Rather, the CSO is primarily responsible for the Member's behavior throughout the four weeks.

Correcting a Member's lack of responsiveness, a Sponsor's and/or Supervisor's lack of support, or the Member's and Supervisor's misunderstanding or incapacity for the training rest with the CSO.

The Training Unit and VMSU will supply resources to guide the Candidate/Member and the Sponsor/Supervisor through the PSO Blend process. Training Coordinators and Member Support Technicians will personally respond to Candidates' needs in the pre-service stage of the Blend. The CSO must reinforce and ensure both parties understand and live up to their responsibilities, unlike the classic PSO. And once the Candidate is a Member, the Training Coordinator must work with and rely on the CSO to enforce compliance with policy and expectations.

In terms of CSO attendance during the PSO Blend, VISTA welcomes and supports the State Director or Program Officer attending the "Launching Your VISTA Service" webinar, but attendance is not required.

The CSO must be available immediately following the “Launching Your VISTA Service” webinar, and during the OSOT, to respond to their Members’ concerns or needs. Each class will have a forum through which a member can discuss issues and raise questions with the facilitator, and CSOs may join those forums upon request to the training coordinator. The facilitator of the cohort will alert the Training Unit if there are issues for the CSO to address.

VISTA’s Partnership with Sponsors/Supervisors throughout the PSO Blend

The Sponsor and Supervisor must be able and prepared to support the four-week syllabus in terms of:

- Investigating and ensuring that the Candidate meets the requirements to participate in a PSO Blend
 - English language proficiency
 - Broad and reliable Internet connectivity
 - Competence to learn through computer-based training
 - Access to a laptop or desktop computer as needed (e.g., in completing Portal screens and coursework and participating on webinars)
 - An environment conducive to participating in the PSO Blend (e.g., space other than a café on a smartphone)
- Furnishing a work station
- Supplying an oath form and fingerprint cards on the first day of service
- Submitting the oath form[s] in PDF to the CSO within 24 hours of the start of service
- Ensuring the Member submits his/her fingerprints cards to VISTA HQ within the deadline (see VDR Chapter on Criminal History Checks)
- Adjusting the Member’s schedule to participate throughout the four-week syllabus
- Implementing an Onsite Orientation & Training (OSOT)
- Reviewing the candidate’s VAD

(Please refer to the Appendix 18B-1 for details on the syllabus.)

Supervisors are invited and encouraged to attend the “Launching Your VISTA Service” webinar with their Candidates/Members and to be present for the induction and hand off from the CSO.

Supervisors are further welcome to attend the entire PSO Blend, but the VISTA program does not require them to do so.

Training Deferments and PSO Blend

The PSO Blend is not conducive to training deferments because the PSO Blend is designed in concert with the OSOT and the VISTA already being onsite. The PSO Blend is designed to dovetail with the start of service and OSOT; hence, training-deferred candidates are at a disadvantage and are likely to have less knowledge regarding VISTA service, the VAD, VISTA terms and conditions, etc. Data also shows that training-deferred VISTAs are more likely to early terminate.

In the rare event that any training deferment is requested for a PSO Blend participant, the CSO must submit the request to the Area Manager for approval. If approved by the Area Manager, the Area Manager must notify the VISTA Director (and cc the Training Director) and include the following:

1. A detailed justification of why the training deferment is needed
2. What other options have been explored to avoid the deferment
3. The ramifications of not approving the request
4. Assurance that the candidate can and will attend the next available PSO event
5. Assurance that the CSO will ensure the training-deferred VISTA is properly on-boarded and oriented to VISTA

Project-Specific PSO Blend

VISTA sponsors interested in having a project-specific classroom in a scheduled PSO Blend should contact the CSO who will coordinate with the Training Coordinator at VISTA HQ.

The project must have about 30 VISTA candidates starting at the same time. While VISTA will implement its national curriculum, projects are welcome, in coordination with the Training Coordinator, to build on the training and integrate tailored material into the curriculum where appropriate. Please alert the Training Coordinator as early as possible, but no later than one month in advance.

Basic Steps to Prepare Candidates for Service

The VISTA Training Unit (VTU), VISTA Member Support Unit (VMSU), CNCS State Office (CSO), and the Sponsor/Supervisor are partners in positioning the VISTA Applicant/Candidate/Member for success.

1. Recruiting the Best Person for a Position

Recruitment begins with a Sponsor's well-crafted service opportunity listing in the Portal, optionally supplemented by announcements through other media. Go to <https://www.vistacampus.gov/resources/marketing-recruitment> for recruitment resources.

The VISTA program expects that the sponsor, through guidance and support of the CSO, will:

- interview individuals

- ensure the applicant reviews the VAD understands the assignment (see VAD below)
- review the essential terms and conditions of VISTA service, e.g.,
 - terms of commitment
 - living allowance
 - criminal history background: full self-disclosure
 - fingerprinting, i.e., obtaining prints and submitting the cards to VISTA HQ
 - benefits and their requisites
 - training, and if attending a PSO Blend, ensuring the requirements as stated above are met

The VISTA program further expects that the sponsor has explored whether the applicant has a need for accommodation, or a criminal history that had not been shared on the application. If either condition exists, the sponsor should alert the CSO as this may impact the applicant’s eligibility and participation in training. *(Please see Special Needs section below.)*

1. a. **VISTA Assignment Description (VAD)**

Project sponsors should provide a VISTA Assignment Description (VAD) to each of their applicants during the interview, and well before the start of PSO Blend. The VAD describes a VISTA’s specific tasks and responsibilities with the project.

- Sponsors must submit the VISTA Assignment Description (VAD) to the CSO for review
- The CSO must ensure the tasks are reasonable and effective in the context of the project’s objectives, and comply to policy and legal constraints
- Sponsors review the VAD with the applicant during the initial interview
- Sponsor and CSO confirm that the candidate/member has an up to date copy of the VAD for use during On Site Orientation and Training (OSOT) and the PSO Blend

A VAD that is valuable to the candidate and member is one that addresses the tasks for which the VISTA will be responsible, with rough timelines for the VISTA’s year of service, and an indication of the sponsor’s priority of those tasks.

A tutorial and sample VAD form is on the Supervisor’s Page under “Life as a Supervisor,” “The VISTA Assignment” on the [VISTA Campus](https://www.vistacampus.gov) <https://www.vistacampus.gov>

2. Enrolling a Candidate in the PSO Blend

NOTE: Appendix 18A-1 is a detailed step-by-step guide to enrollment and implementation of the PSO Blend.

The Training Coordinator coordinates enrollment in the PSO Blend.

The PSO Blend can serve as a safety net to ensure all Candidates are on-boarded with little or no delay. Because the deadlines for the PSO Blend are later than the deadlines for the face-to-face PSO, CSOs should share only the (earlier) deadlines for the face-to-face PSO.

Deadlines for the PSO Blend should not be shared with Sponsors as recruitment and on-boarding deadlines.

Once the CSO approves an applicant for candidacy, and if the deadline for the PSO has passed, then a Candidate may be enrolled in a PSO Blend if the Sponsor and CSO have established that all requirements for participation have been met. Place an individual in a PSO Blend after confirming that

- language skills are adequate
- Internet connectivity is reliable
- the environment is conducive to distance learning
- the individual has more than a smartphone available to complete the Syllabus
- the Sponsor and Supervisor can support the four-week syllabus

If the requirements are met, the CSO will enroll a candidate via the Portal no later than 17 days prior to the candidate's service start date—which is the first webinar in the PSO Blend following the online coursework. For example, if a candidate's first day of service is July 25th, they should be enrolled no later than July 8th.

3. Supervisor Contact Information

In an effort to facilitate effective communication about the PSO Blend requirements and expectations with sponsors and supervisors, the VISTA Training Unit, in partnership with CSOs, will reach out to VISTA supervisors for each PSO they have candidates attending.

Upon a candidate's enrollment in the PSO Blend, CSOs send the VISTA Training Unit representative managing that PSO Blend the contact information (name, email address, and phone number) of the candidate's direct supervisor. CSOs can also provide the contact information for any additional staff at the project who need to be aware of the PSO Blend requirements.

This information should be sent to the VISTA Training Unit upon enrollment, but no later than the enrollment deadline.

4. Travel Request Profile (TRP)

The VMSU manages relocation travel. Given the short turn-around from the PSO Blend enrollment deadline to start date, the VMSU will create the Travel Request Profile (TRP) on behalf of the candidate and will not verify site addresses with the CSO. The CSO must ensure that the site address is accurate at the time of the candidate's placement.

The VMSU sends notification to the Candidate of the approval to relocate and the amount of the relocation assistance. This is done on a rolling basis as Candidates are enrolled in the PSO Blend. All candidates will receive a notification about their relocation within one week of being enrolled. The notification includes guidance on how to follow up with the VMSU if a Home of Record or Site Address is incorrect.

All relocating candidates are required to relocate prior to the first day of PSO Blend.

Relocation vouchers will be posted to the member's MyAmeriCorps portal on the first day of PSO Blend. The member must print, sign, and mail the voucher to the VMSU within five days.

A 17-day deadline is short order for a candidate to complete all of the requisite work. The VMSU and VTU recommend enrolling candidates in the PSO Blend as early as possible, and that the Sponsor or supervisor alert the candidate of the pre-service requirements.

The candidate must:

- Complete Portal on-boarding screens
- Complete coursework, including
 - The Guide to Starting Service that includes the syllabus and our expectations
 - Accepting VISTA's Terms and Conditions
 - Succeeding in the Comprehension Check
- Relocate (if applicable)
- Clarify issues with the sponsor, the CSO, the VMSU or VTU, prior to the PSO Blend
- Submit fingerprint cards to VISTA HQ before the conclusion of the PSO Blend (30 days from start of service). See VDR Chapter on Criminal History Checks for details

5. Special Needs—Physical, Linguistic, and Other Accommodation

If a VISTA candidate has a need for physical accommodation, due to a vision or hearing impairment, limited mobility, or use of hands, for example, the candidate is expected to

alert the CSO and/or VTU as soon as possible. Certain impairments will prevent the candidate from participating in the PSO Blend.

Attendants/assistants for the candidate may assist him or her throughout the PSO Blend syllabus. The CSO should inform the Training Coordinator who will work to accommodate the person to the extent possible.

Similarly, if the candidate has low English language proficiency, lacks reliable connectivity to the internet, lacks basic computer literacy, is uncomfortable with computer-based learning, has only access to a smartphone, or does not have a workspace conducive to learning, the CSO and the VTU must be alerted as these will prevent the candidate from participating in the PSO Blend.

To accommodate these needs or lack of compliance, attending a face-to-face PSO is the best alternative to the PSO Blend

6. Mandatory Portal “Paperwork” Prior to PSO Blend

Once the CSO enrolls a Candidate in PSO Blend, the Candidate will receive an email directing them to the [VISTA Pre-Service Coursework and Onboarding page](https://www.vistacampus.gov/vista-pre-service-coursework-and-onboarding) (<https://www.vistacampus.gov/vista-pre-service-coursework-and-onboarding>) of the VISTA Campus. This page links the candidate to the [My AmeriCorps Portal](https://my.americorps.gov) (<https://my.americorps.gov>) to complete the online on-boarding screens (paperwork): Direct Deposit, W-4, Unpaid Compensation, Life Insurance, End of Service Benefit (Education Award or Stipend). The email also links them to the required preservice coursework on the VISTA Campus.

The VMSU will alert the CSO if a candidate has not completed the requisite paperwork one week in advance of the start date. Failure to complete the paperwork will prevent the Candidate from starting service or receiving relocation support.

The VISTA program recommends that the sponsor impress upon the candidate the importance of completing this paperwork (like the coursework addressed below) as soon as possible. Incomplete paperwork and/or coursework will prevent the VISTA from starting service as planned.

7. Mandatory Online Coursework Prior to PSO Blend

The VTU will direct Candidates to the [VISTA Pre-Service Coursework and Onboarding page](https://www.vistacampus.gov/vista-pre-service-coursework-and-onboarding) (<https://www.vistacampus.gov/vista-pre-service-coursework-and-onboarding>) where they will be registered and required to complete a number of online, self-directed (asynchronous) courses and tutorials. An online [Guide to Entering VISTA Service](https://www.vistacampus.gov/lessons/pso-welcome-packet?id=1575) (<https://www.vistacampus.gov/lessons/pso-welcome-packet?id=1575>) will detail the PSO Blend syllabus and outline the candidate’s roles and responsibilities throughout the Blend.

Candidates are required to complete all coursework, accept the Terms and Conditions of Service, and successfully complete a Comprehension Check. The VMSU will alert the CSO whether a candidate has not completed the requisite coursework one week in advance of the start date. Failure to complete the coursework (to include accepting the terms and conditions, and passing the comprehension check) will prevent the candidate from starting service and receiving relocation support.

The VISTA program recommends that the sponsor impress upon the candidate the importance of completing this coursework, like the portal paperwork, as soon as possible.

8. Submission of Fingerprints Prior to Conclusion of PSO Blend

The CSO will send fingerprint kits to the sponsor before the VISTA candidates arrive on site. The kits contain print cards and directions on how to acquire print services as well as how and where to send those prints. Those prints must be received no later than 35 days after the VISTA member's service start date. The member may request an extension if required. *For details, please refer to the VDR Chapter on Criminal History Checks.*

See Appendix 18A-1 for roles and responsibilities of all the training partners.

Requirement to Take the Oath or Affirmation of Service

As a condition of entry into service, VISTA candidates are required to take the same oath or affirmation as individuals entering federal employment, as set forth in the Domestic Volunteer Service Act of 1973, as amended, VISTA's authorizing legislation.

A CNCS representative, most often the CSO Director or Program Officer, administers the Oath or Affirmation of Service in the virtual classroom during the "Launching Your VISTA Service" webinar. The supervisor will supply a copy of the oath form to the VISTA prior to the webinar.

The VISTA member will sign the oath form, and give it to their supervisor who will compile all oath forms and email them to the CSO. The CSO will compile oaths from all their projects and send them (in one email) to the VMSU. The VMSU will print, sign, and file them.

A copy of the AmeriCorps [VISTA Oath](http://portal.cns.gov/Portals/0/AmeriCorpsVista/Member%20Forms/AmeriCorps%20VISTA%20Oath%20Form.pdf) (<http://portal.cns.gov/Portals/0/AmeriCorpsVista/Member%20Forms/AmeriCorps%20VISTA%20Oath%20Form.pdf>) is available on VISTA Intranet page under member forms.

ALTERNATE OATH FOR LEGAL RESIDENTS (NON-CITIZENS)

A VISTA candidate who is not a U.S. citizen or a U.S. national but who legally resides within a state (someone who is a permanent legal resident or otherwise is a legal resident of a state) must take the alternate oath of service, as set forth in the Domestic Volunteer Service Act of 1973, as amended.

This alternate oath of service and the alternate AmeriCorps VISTA oath form are available on the intranet at

<http://portal.cns.gov/Portals/0/AmeriCorpsVista/Member%20Forms/AmeriCorps%20VISTA%20Oath%20Form-Alternate.pdf>. Please follow the procedure above.

ALTERNATE OATH FOR RELIGIOUS REASONS

On rare occasions, a candidate may object to taking the oath of service, as set forth in the Domestic Volunteer Service Act of 1973, as amended, for religious reasons. If a VISTA candidate states that s/he cannot pledge, swear, or affirm allegiance to any country, flag, or political institution for religious reasons, the candidate may take the alternate oath for religious reasons. This is in accordance with applicable federal law and regulations prohibiting religious-based discrimination in federally conducted programs such as VISTA.

Please follow the procedures above.

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Chapter 19:

Managing VISTA Leader Professional Development

Chapter Owners: VISTA Training Unit

Effective Date: October 15, 2016

Reviewed: September, 2016

Overview of VISTA Leader Professional Development

The VISTA program offers VISTA Leaders a variety of opportunities to strengthen their leadership skills throughout their term as a Leader. Collectively referred to as the VISTA Leader Professional Development Institute, the opportunities include:

- Webinar for New VISTA Leaders – quarterly webinar for new Leaders who have not yet attended Leader Orientation
- VISTA Leader Orientation – a 3½-day face-to-face training offered three times a year
- VISTA Leader Professional Development Webinars – monthly online training sessions
- Action Learning Challenge – a hands-on learning opportunity
- Virtual Professional Development Coaching – on a short-term, as-needed basis

Webinar for New VISTA Leaders

To bridge the time from when VISTA Leaders begin service and attend VISTA Leader Orientation, the Webinar for New VISTA Leaders provides information to orient them to their role as a VISTA Leader and to connect them to important resources on the VISTA Campus.

Responsibilities of VISTA Training Specialist

- Maintain a list of new VISTA Leaders who have not yet attended Leader Orientation.
- Send information to new Leaders about the webinar
- Join the webinar to provide words of welcome to VISTA Leaders

Responsibilities of Leader Facilitators

- Schedule the webinar and provide details to the Training Specialist and post the date and time on the VISTA Campus

- Facilitate the webinar and handle questions
- Provide attendance report to Training Specialist

VISTA Leader Orientation

VISTA Leader Orientation is a formal training designed to enhance and reinforce the Leaders' understanding of important leadership capacities and their roles as VISTA Leaders. This three-and-a-half day training provides opportunities for Leaders to explore their own leadership capacities, challenge conventional thinking, learn new approaches to strengthening leadership, and connect with other Leaders.

All Leaders are expected to attend Leader Orientation during the first few months of their Leader term. Leaders who did not previously serve as a VISTA must attend PSO before starting their VISTA Leader term.

State Offices are responsible for enrolling Leaders in VISTA Leader Orientation. See Appendix 19A – Roles and Responsibilities in Implementing VISTA Leader Orientation for the process for enrolling Leaders in VISTA Leader Orientation.

VISTA Leader Professional Development Webinars

The monthly [VISTA Leader Professional Development Webinars](https://www.vistacampus.gov/leader-webinars) (<https://www.vistacampus.gov/leader-webinars>) provide practical information, relevant insights, and learning intended to enhance the personal and professional development of VISTA Leaders. The 90-minute sessions cover a wide range of topics, providing Leaders with information they can immediately apply, and serve as networking opportunities for Leaders.

Responsibilities of VISTA Training Coordinator

- Update the VISTA Campus with current offerings on the [Leader webinars page](#)
- Send email invitations to leaders, encouraging participation in upcoming webinars
 - Send initial invitation approximately three weeks before the webinar
 - Send a reminder message two to three days before the webinar
- Maintain record of webinar participation

Responsibilities of Leader Facilitators

A consulting firm that provides training and technical assistance to CNCS manages the facilitators of the VISTA Leader Webinars program. The facilitators are responsible for the following:

- Developing webinar topics and sessions
- Developing calendar of webinar offerings

- Managing participant registration process
- Conducting webinars and administering evaluations
- Providing information on participation and evaluation results

Action Learning Challenge

[The Action Learning Challenge \(https://www.vistacampus.gov/leaders/action-learning\)](https://www.vistacampus.gov/leaders/action-learning) is a three-month experiential learning opportunity that engages VISTA Leaders in small project teams. Each Action Learning Team plans and executes a project that will provide useful information and resources for other VISTAs, Leaders, supervisors, and the VISTA program. The Action Learning Challenge is designed to further enhance the leadership development of VISTA Leaders and meet the strategic goals of the VISTA program. VISTA staff suggests project topics and each Action Learning facilitator selects one of these topics for their learning challenge.

The Action Learning Challenge has three primary goals:

- Enhance the leadership, project management, and project implementation skills of VISTA Leaders
- Strengthen the VISTA program
- Contribute to state-of-the-art resources available on the VISTA Campus

The Action Learning Challenge is offered twice a year. About a month before offering, Leaders are invited to join an Action Learning Team. The application process starts with an informational webinar. Interested Leaders must secure the approval of their project supervisor and CSO and submit it with their online application.

Responsibilities of VISTA Training Coordinator

- Solicit project ideas from VISTA HQ staff, CSOs, Leader facilitators, and/or other stakeholders
- Provide Leader facilitators with list of project ideas to select from
- Update the Action Learning Challenge page on the VISTA Campus
- Approve final projects for teams to work on
- Send invitations to Leaders for the Action Learning Challenge informational webinars
- Meet with Action Learning Challenge teams early in their process to provide additional background on the project idea and clarify any unclear aspects
- Invite VISTA HQ, CSOs and others to attend final Action Learning Challenge team presentations
- Post finished Action Learning Challenge team products on the VISTA Campus

Responsibilities of Leader Facilitators (managed by the T&TA consulting firm)

- Suggest project ideas and participate in selection process for final projects
- Schedule and conduct informational webinars

- Manage online application process
- Facilitate and coach Action Learning Challenge teams
- Serve as liaison between teams and CNCS staff
- Schedule and facilitate final project presentations

Virtual Professional Development Coaching

[VISTA Leader coaching \(https://www.vistacampus.gov/professional-development-coaching\)](https://www.vistacampus.gov/professional-development-coaching) is specifically focused on supporting VISTA Leaders in transferring, applying, and implementing the knowledge and skills they learn in Leader Orientation, webinars, and the Action Learning Challenge.

Coaching is available on a short-term, limited basis to meet a Leader's specific need. This one-on-one coaching is conducted remotely by phone, email, and webinar. VISTA Leaders interested in receiving coaching services may contact any of the Leader facilitators directly to express their need.

Responsibilities of VISTA Training Coordinator

- Update the VISTA Campus with current information about coaching service
- Inform CSOs about the availability of coaching for Leaders, as needed

Responsibilities of Leader Facilitators (managed by the T&TA consulting firm)

- Respond to inquiries from Leaders interested in coaching
- Assign coaching to appropriate facilitator
- Provide coaching services, tracking time spent

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Chapter 20:

On-Site Orientation and Training

Chapter Owners: VISTA Training Unit

Effective Date: October 15, 2016

Reviewed: September, 2016

Overview of On-Site Orientation and Training

There are two distinct curricula that AmeriCorps VISTA uses to orient a VISTA candidate to VISTA service. The most widely attended is a face-to-face model, which is often referred to as the Pre-Service Orientation (PSO) Classic. The alternative orientation is a virtual, distance learning model, referred to as the PSO Blend.

On-Site Orientation and Training (OSOT) is an extension of the Pre-Service Orientation (PSO), building on concepts presented in PSO and focusing more sharply on the specific tasks of the individual VISTA. Designed and implemented by the sponsoring organization, OSOT begins with the arrival of VISTAs at the project site.

OSOT may continue for an extended period because it involves introducing the VISTA to the sponsoring organization, the local community, and the VISTA's role within the organization and community.

OSOT plans are developed by the sponsoring organization and reviewed and approved by the CNCS State Office (CSO).

ON-SITE ORIENTATION AND TRAINING FOR VISTA MEMBERS ATTENDING PSO CLASSIC

Immediately following Pre-Service Orientation (PSO), a VISTA member is formally oriented by the project sponsor/supervisor to the assignment, sponsoring organization, and community. This On-Site Orientation and Training (OSOT) differs from the PSO in several important aspects. The PSO—the face-to-face, “classic” model—is usually conducted on a cluster-wide basis, and presents a national curriculum, while the OSOT is specific to the project and the VISTA's assignment.

The PSO Classic is an intensive three-and-a-half-day training, employing professional facilitators and CNCS staff. The OSOT is most often a longer, slower paced training; is often informal (though no less methodical) in approach; and is implemented by co-workers, community members, and at times even directed by fellow VISTA members. The PSO orients an individual to the VISTA program and the support systems of AmeriCorps VISTA and CNCS; the OSOT prepares a member to serve effectively in the sponsoring organization and the target community.

The PSO Classic design is built on certain assumptions about the OSOT. The PSO prepares VISTA members to raise questions and issues with their sponsors during OSOT in order to glean as much as possible as quickly as possible upon arrival on site. AmeriCorps VISTA's PSO design, therefore, assumes that time will be made for the member and supervisor to discuss in detail the goals, objectives and tasks documented in the VISTA Assignment Description (VAD).

Recent member/alumni surveys indicate that, while the lack of an effective OSOT does not lead to a member quitting the project early, nearly 100% of the people who did terminate their service early indicated that they did not receive an effective OSOT. A thoughtful, methodical OSOT design is a key element to the success of the VISTA member and the project. CSO staff, in approving a project, review a sponsor's plans for OSOT and base their evaluation of the project's merits and potential for success on these designs. In a sense, the OSOT is the supervisory facet of the project, coupled with the VAD that defines the VISTA member's service for the year. The OSOT ensures the VISTA member understands and is prepared to carry out his/her assignment, and helps identify areas where training or coaching is required.

ON-SITE ORIENTATION AND TRAINING FOR VISTA MEMBERS ATTENDING PSO BLEND

In early 2016, AmeriCorps VISTA instituted a virtual PSO model – an intensive 4 week curriculum consisting of online coursework, webinars, teleconferences, and field work led by professional facilitators, onsite staff, and the members themselves. Technically, this training approach is termed a blended curriculum, and AmeriCorps VISTA refers to it as the PSO Blend.

Foundational to the design of the PSO Blend is that learning and service on site are mutually supportive. General concepts, such as the causes of poverty, underpin specific issues concerning the member's assignment, the sponsoring organization and the target community. OSOT is at the heart of the PSO Blend, and the PSO Blend's learning events are predicated on information gained during the OSOT. The success of orientation and the success of the project hinge on a well-designed and implemented OSOT.

Sponsor's Responsibilities for OSOT

- Develop an OSOT plan that is consistent with project goals and meets the desired learning objectives
- Submit OSOT plan with the VISTA candidate's application to the CSO no later than 30 days prior to the PSO
- Involve the VISTA in an ongoing evaluation of OSOT activities and adjust plans as necessary to meet individual VISTA member's needs

OSOT Learning Objectives

By the end of OSOT, the VISTA member should have achieved the following learning outcomes:

- Understand common expectations and agreements for a working relationship between the VISTA member and supervisor:
 - Supervisor's other roles and responsibilities
 - Supervisor's management style
 - Scheduled meetings and interactions between VISTA member and supervisor
 - Clarification of the lines of communication between VISTA member and supervisor
 - Delineation of the support provided to the VISTA member
 - Mutual understanding of the terms and conditions of VISTA service
 - Chain of command
- Understand the mission and goals of the sponsoring organization:
 - Mission
 - History
 - How the organization functions (as a nonprofit, municipality, state, county, or federal entity)
 - Role in the community
 - Staff (introductions)
- Recognize the context of the VISTA project:
 - VISTA project and its history
 - How and where does the VISTA member fit
 - Introduction to the community
 - Socioeconomic and political structure of the community
 - Potential resources that can be applied to achieve project goals
 - History and present status of community self-determination and problem-solving efforts
- Understand the organization's culture and policies (and where VISTA policy overrides organizational policy)
 - Roles and responsibilities
 - Time and attendance, duty hours
 - Annual leave
 - Sick leave
 - Mileage reimbursement policy and procedure
 - Working with the media
 - Fund raising activities
 - Evaluation of individual VISTA members and of the project
 - Reporting requirements for the VISTA project

- Develop, with the supervisor, a personal work plan, based on the VISTA Assignment Description (VAD), that specifies:
 - Tasks and activities for a specific period to accomplish the goals and objectives in the project work plan
 - Training needed for the assignment, which builds on the PSO and OSOT toward the personal and professional development of the VISTA member

Depending on the project, the supervisor may deem it necessary for the VISTA member to receive training in such areas as computer skills, public speaking, group facilitation, conflict resolution, needs assessment and asset mapping, grant writing, and negotiation and interviewing skills.

A VISTA member may also need specific training in issue areas and on such topics as domestic violence hotlines, early childhood literacy, laws regarding foster care, credit management, and microenterprise development. The VISTA member’s actual needs depend on the requirements of the project and the experience, skills, and educational background the VISTA member already possesses.

Suggested Orientation and Training Methods

The methods the supervisor may use for orientation and training include:

- Brainstorming, discussion, and negotiation between the sponsor and VISTA member, or among the supervisor, VISTA member, and a larger team (e.g., with other project staff)
- Interviews and discussions with key community leaders or even with a random sample of residents and community members
- Homework – e.g., have the VISTA member review the project proposal the sponsor submitted to CNCS, the Memorandum of Agreement (MA) between CNCS and the sponsor, the VAD, and other pertinent organization position papers
- Field trips and strategically assigned tasks the VISTA member needs to complete
- Shadowing others who are performing similar work
- Attendance at staff, advisory board, and community meetings
- Asking staff, colleagues at other organizations, and experts to share some time reviewing their “tricks of the trade” or providing specific skill training
- Free or low-cost skill training from various community resources, such as:
 - Community colleges
 - Libraries
 - Community resource and technology centers
 - Trade associations
 - Community adult education programs
- Incorporate the resources located on the VISTA Campus into the orientation process

- Guide the VISTA member to the VISTA Professional Webinar Series calendar of events, located on the [VISTA Campus](http://www.vistacampus.gov/webinars) (<http://www.vistacampus.gov/webinars>)
- Guide the VISTA member to the in-depth VISTA Blend courses accredited by the American Council on Education. The two courses address “Volunteer Mobilization” (10 weeks to complete/3 credit hours) and “Resource Development” (13 weeks to complete/3 credit hours). The registration page is located on the [VISTA Campus](http://www.vistacampus.gov/vistablend) (<http://www.vistacampus.gov/vistablend>)

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Chapter 21: *Reserved*

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Chapter 22: VISTA Leaders Guidance

Chapter Owners: VISTA Training Unit

Effective Date: October 15, 2016

Reviewed: September, 2016

VISTA Leader Purpose ²⁰

VISTA Leaders (referred throughout as Leaders) serve in large VISTA projects or by region. Their aim is to expand and build the capacity of the VISTAs (and VISTA Summer Associates) they lead, in coordination with the projects in which they serve. VISTA Leaders do not function as a CNCS employee nor do they replace the VISTA supervisor.

VISTA Leaders play a strategic role in the following areas:

- **Recruitment** – Leaders help sponsors market their VISTA positions and recruit VISTAs. Leaders may be brought onto a project before VISTAs to help with recruitment and help new VISTAs settle into their new communities
- **Retention** – From helping to plan and conduct on-site orientation and training, to providing project teams with daily guidance (information) and attention, Leaders assist VISTAs in overcoming many of the on-site barriers that lead to early termination
- **Performance** – They facilitate information sharing and peer learning, increasing the capacity of VISTAs to complete their work plans successfully and developing an esprit de corps among the VISTA cadre

Two types of Leaders exist:

1. *Project-Based Leaders* who may serve on a project that has more than eight VISTAs
2. *Regional Leaders* who may support VISTAs in up to three projects, usually working in a similar issue area. Regional Leaders:
 - Are supervised by, and report to, only one VISTA supervisor/sponsor
 - Have assignment descriptions developed by and agreed upon by all projects served
 - Serve projects near each other
 - Have means to communicate with and travel to the projects served

²⁰ [45 C.F.R. § 2556.600 \(2016\)](#).

How to Acquire a VISTA Leader

The State Program Director approves or denies the addition of a VISTA Leader position to a specific project. Approval is dependent on compliance with the Leader policy, availability of funding, and the nature of the agreement with the sponsor. The CSO selects which projects may have a Leader, determines the number of Leaders that may serve at designated projects, and approves the Leaders to serve at designated projects. In the case of Regional Leaders, the CSO works with all projects involved to determine where to locate the Leaders and who shall supervise.

Table 1. Recommended Ratio of Leader to Number of Projects and VISTAs

Type of Leader	Number of Projects		Number of VISTAs
Project-Based Leader	1 project (potentially multiple sites for the project)	AND	8 minimum
Region-Based Leader	3 projects maximum		8 minimum

Relationship Between a VISTA Leader, a VISTA Supervisor and a VISTA Member²¹

A Leader reports to only one supervisor. The Leader's role is to coordinate and assist VISTAs in communications and performing their service. The Leader is essentially a support to their VISTA supervisor and the VISTAs. The Leader is not an intermediary between the sponsor/supervisor and the VISTA program/CNCS State Office (CSO). Moreover, the Leader is not responsible for the oversight or supervision of VISTAs; that role rests with the VISTA supervisor and the CSO.

With a mutual understanding of the parameters of the Leader's role, the Leader may effectively broaden the reach of the VISTA supervisor. The assignment description is a guide to the Leader's service goals and objectives, but determining how the work of the supervisor and Leader dovetails and how and when to best communicate, requires discipline and focus between these two partners early on and throughout the year. Table 2 offers examples of appropriate role balance for the supervisor and Leader.

Because of their inherent skills and abilities, Leaders often take on more responsibility or receive more authority than is reasonable or appropriate. Keeping focused and within the limits of the Leader's roles are crucial to the Leader's success. To this end, regular communication between the supervisor and the Leader is highly effective. It is imperative that VISTAs understand the distinctions between a supervisor and Leader, and know to whom to turn for what they need. Co-facilitating a discussion with the Leader

²¹ [45 C.F.R. § 2556.620 \(2016\)](#).

and VISTAs, and providing a reference sheet about procedures and points of contact are effective methods for Supervisors and Leaders to keep VISTAs informed.

Eligibility²²

Individuals are eligible to serve as Leaders if they have successfully completed at least one term of service with AmeriCorps VISTA, AmeriCorps State and National, AmeriCorps National Civilian Community Corps (NCCC), or one traditional term of service as a Peace Corps volunteer.

Additionally, VISTA Leader applicants must have strong recommendations from their last project supervisor, a record of outstanding performance, and demonstrated leadership ability. A VISTA is not entitled to a Leader position. A VISTA must apply to an open Leader position and go through the application and interview process.

Individuals who served with Peace Corps and identify as Returned Peace Corps Volunteers (RPCVs) must submit a Description of Service (DOS) as part of their application package. The DOS is an official Peace Corps statement of an RPCV's service authored by the Country Director. It describes the RPCV's training and overseas activities in non-evaluative terms. A sample DOS is available in Appendix 22B. The DOS must be submitted to the CSO and kept in the project file.

Terms and Conditions of a VISTA Leader Position²³

The Leader position is full-time and subject to the same terms and conditions of service that apply to VISTAs (outside employment, education courses, Hatch Act, etc.). Leaders may not perform the duties of a VISTA in addition to their functions as Leaders. Though not exhaustive, the following are the terms and conditions of service as a Leader:

- (a) A Leader makes a full-time commitment to serve as a Leader, without regard to regular working hours, for a minimum of one year.
- (b) To the maximum extent practicable, a Leader shall live among and at the economic level of the low-income community served by the project and actively seek opportunities to engage with that low-income community.
- (c) A Leader aids the communication of VISTA policies and administrative procedures to VISTAs.
- (d) A Leader assists with the leadership development of VISTAs.
- (e) A Leader is a resource in the development and delivery of training for VISTAs.
- (f) A Leader may assist the sponsor with recruitment and preparation for the arrival of VISTAs.

²² [45 C.F.R. § 2556.605 \(2016\)](#)

²³ [45 C.F.R. § 2556.625 \(2016\)](#)

(g) A Leader may advise a supervisor on potential problem areas and needs of VISTAs.

(h) A Leader aids VISTAs in the development of effective working relationships and understanding of VISTA program concepts.

(i) A Leader may aid the supervisor and sponsor in directing or focusing the VISTA project to best address the community's needs.

(j) A Leader may serve as a collector of data for performance measures of the project and the VISTAs.

(k) A Leader is prohibited from supervising VISTAs. A leader is also prohibited from handling or managing, on behalf of the project, personnel-related matters affecting VISTAs. Personnel-related matters affecting VISTAs must be managed and handled by the project and in coordination with the appropriate CNCS State Office.

Developing a VISTA Leader Position

CSOs promote the opportunity to develop a Leader position to projects that meet certain conditions (see bullets below and Table 1). A sponsor may request a Leader through the CSO. A sponsor's official request for a Leader must include a VISTA Leader Assignment Description (VLAD) in the sponsor's project application to the CSO. If the need for a Leader arises after the project application has been approved, the VLAD may be submitted to amend the project application accordingly. The VLAD may also serve as a tool for recruiting.

The CSO considers the following criteria when determining the approval of a Leader position:

- Clearly defined need for a VISTA Leader on the project
- VLAD defines appropriate tasks with realistic goals
- Adequate supervisory support for Leader

Recruitment

The sponsor may recruit a Leader, with the concurrence of the CSO, in several ways:

- Consider VISTAs currently serving on the specific project (if the VISTA will have already completed a year of service)
- Request the CSO send out information about the Leader position to all projects in the state, region, or city
- Recruit through VISTA resources, such as the [VISTA Job Board](#) and VISTA Campus [Discussion Forums](#)

- Contact the Training Specialist at VISTA HQ, who can provide additional suggestions in the recruitment process

Applying to Serve as a VISTA Leader ^{24,25}

In the same manner as someone applies through My AmeriCorps to be a VISTA, individuals must apply to an open Leader position and go through the application and interview process. The CSO reviews the application, considers the recommendation(s), and approves or disapproves the individual to serve as a Leader.

The exception to this requirement is a VISTA who is currently serving at a project and wants to become a VISTA Leader at the project once the current year of service is completed. If the CSO, supervisor, and VISTA agree regarding the VISTA's capacity to serve as a VISTA Leader, then the VISTA may skip the application process and go on to the enrollment process. If more than one current VISTA is interested in becoming a VISTA Leader, the supervisor should use a formal selection process that includes interviews to determine which VISTA becomes the Leader. The enrollment process includes completion of the Future Plans Form by the VISTA and revision of the VISTA's purpose code by the CSO.

Training Requirements

Leaders participate in a Leader Orientation scheduled at various times throughout the year. This training is mandatory and Leaders should bring a copy of their VISTA Leader Assignment Description (VLAD) to training. If a VISTA Leader has not previously served as a VISTA, the individual must attend PSO prior to starting his/her term of service as a VISTA Leader. In rare circumstances, a non-VISTA alum, due to calendar dates, may need to attend a Leaders Orientation prior to attending a PSO; having the person attend a PSO at the earliest date is most important.

For information related to training enrollment deadlines and training deferments, please review guidance in VDR Chapter 18A: Managing Pre-Service Orientation and Supervisors Orientation.

VISTA Leader Options for Transfer

The approval process to transfer a Leader to another project is the same as it is for a VISTA. For details, see the [Change in Service](https://www.vistacampus.gov/chapter-12-administrative-policies-0) (<https://www.vistacampus.gov/chapter-12-administrative-policies-0>) section of Chapter 12 in the VISTA Member Handbook.

TRANSFER MID-SERVICE FROM LEADER TO VISTA

²⁴ [45 C.F.R. § 2556.610 \(2016\)](#)

²⁵ [45 C.F.R. § 2556.615 \(2016\)](#)

In addition to transferring from one project as a Leader to another project as a Leader, Leaders may also transfer to projects where they would serve as a VISTA (not a Leader). In such cases, the CSO must adjust all benefits accordingly.

TRANSFER MID-SERVICE FROM VISTA TO LEADER

A VISTA in his/her second, third, fourth or fifth year of service is eligible to assume or transfer to a Leader position, with the following expectations:

- The Leader position has a VISTA Leader Assignment Description (VLAD) that clearly defines the Leader's role
- The CSO speaks with the VISTA to ensure the VISTA understands the parameters of the Leader's role
- The CSO decides that the VISTA is appropriate for the Leader position, as opposed to opening up the project to all potential Leaders to apply
- The VISTA has at least six (6) months until the VISTA's close of service
- The Leader attends the next available Leader Orientation
- The VISTA will serve as a Leader through completion of the current term of service
- All benefits are adjusted accordingly

VISTA Leader Benefits

LIVING ALLOWANCE

Leaders receive a \$200 per month increase in their living allowance. If the \$200 per month increase raises the living allowance above the federal or state minimum wage (whichever is higher), the Leader may choose one of the following options:

- Retain the lower living allowance to keep public assistance payments (see 42 USC. Sec 5044 of the Domestic Volunteer Service Act of 1973, as amended)
- Accept the allowance increase, with an understanding that it may jeopardize eligibility for, or the level of, governmental assistance, including public assistance payments

HEALTH AND CHILD CARE

Leaders receive health care coverage in accordance with the provisions of the AmeriCorps Health Benefits Program. They also are eligible for child care in accordance with the provisions of the child care plan offered by the VISTA program. See VDR Chapter 24: Health and Child Care Benefits.

END-OF-SERVICE BENEFITS

Upon successful completion of service, Leaders have the option of an Education Award or cash stipend as an end-of-service benefit. Leaders can select a \$0 Education Award after two full time value awards have been earned. The cash stipend is \$3,000. The Education Award and cash stipend are subject to all the regular conditions, limitations, and tax ramifications.

TRAINING

The Leaders training provides Leaders with an introduction to their new roles and equips them with a set of skills to help recruit and assist VISTAs, and ensure their projects are sustainable.

The goals of Leaders training are:

- Define and clarify the role of the Leader
- Clarify Leaders' personal expectations and understanding related to their unique approach to leading VISTAs
- Establish a fundamental understanding of the complexity of effective communication within the context of the Leader role
- Provide an opportunity for Leaders to establish a support network
- Introduce and relate the Transformational Leadership Model for making decisions and guiding behavior within the Leader service context
- Enhance the Leaders' understanding and skills related to a variety of leadership roles (facilitator/educator, resource generator, mentor, liaison, ambassador, and recruiter)

Most Leaders begin service before attending a Leader Orientation so the Leaders section of the VISTA Campus contains helpful materials and resources.

Table 2. Examples of Appropriate Leader and Supervisor Roles

Task / Activity	Leader Support	Supervisor Contribution
Conducting an On-Site Orientation and Training (OSOT)	<ul style="list-style-type: none"> ▪ Collate orientation materials ▪ Draft agenda ▪ Help to secure guests, speakers and facilitators ▪ Participate in implementation of OSOT 	<ul style="list-style-type: none"> ▪ Finalize agenda ▪ Ensure the OSOT plan is submitted to the CSO ▪ Help to secure guests, speakers and facilitators ▪ Implement OSOT
Recruiting and selecting new VISTAs	<ul style="list-style-type: none"> ▪ Promote position announcement through local venues ▪ Assist in setting up and participate in interviews of top applicants ▪ Provide input to supervisor 	<ul style="list-style-type: none"> ▪ Interview top candidates ▪ Nominate candidates for selection and approval by the CSO ▪ Notify candidates of their selection and approval ▪ Ensure paperwork is completed ▪ Accept/select candidates in eGrants/Portal
Facilitating a successful year of service for VISTAs	<ul style="list-style-type: none"> ▪ Make self available to VISTAs as a resource ▪ Listen when VISTAs approach with problems and barriers ▪ Assist VISTAs in identifying their options and creating their own solutions and outlining their options for mediation, including informing supervisor ▪ Involve the supervisor if the VISTAs cannot resolve the issue themselves 	<ul style="list-style-type: none"> ▪ Make self available to VISTAs as a resource ▪ Listen when VISTAs approach with problems and barriers ▪ Assist VISTAs in identifying their options and creating their own solutions ▪ Develop protocol for addressing conflict within group (including the Leader's role) ▪ Intervene when required
Addressing VISTA performance issues	<ul style="list-style-type: none"> ▪ If the supervisor is unaware, call to the attention of the supervisor that performance issue exists and may be impacting the team. 	<ul style="list-style-type: none"> ▪ Discuss with the VISTA the performance issue and explore how to improve - ▪ Determine any organizational measures to be taken to address the situation ▪ Notify the CSO, if the situation merits
Reporting on project performance to CSO	<ul style="list-style-type: none"> ▪ Coordinate collection of data from VISTAs ▪ Clarify points in reports with VISTAs if required ▪ Collate or categorize information ▪ Assist in interpretation of data 	<ul style="list-style-type: none"> ▪ Interpret data ▪ Write report in eGrants ▪ Ensure timeliness of reporting to CSO
Developing or refining Volunteer Assignment Description (VAD)	<ul style="list-style-type: none"> ▪ Review VADs for clarity and accuracy ▪ Suggest improvements or changes ▪ Clarify tasks for VISTAs when required ▪ Offer feedback to determine if tasks appropriately help achieve objectives 	<ul style="list-style-type: none"> ▪ Establish tasks to achieve goal ▪ Write VAD ▪ Review VAD with VISTA and adapt where needed ▪ Monitor achievement of objectives by appropriate tasks ▪ Refine VAD

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Chapter 23A:

Supporting Members—Suitability and Eligibility

Chapter Owners: VISTA Management, and VISTA Member Support Unit

Effective Date: October 15, 2016

Reviewed: September, 2016

Overview

The most impactful VISTA members generally display a commitment to service and a desire to combat poverty and the CSO should assist the sponsor in selecting the best and promising candidates.

While there is no comprehensive list of the various skills, knowledge, and abilities that each VISTA should have, candidates must be both suitable and eligible to serve with VISTA.

Below are some guiding principles the CSO staff should consider and approving nominated applicants.

Suitability ²⁶

At a minimum and per VISTA regulations, an individual interested in serving as a VISTA member must commit to and agree with the following stipulations:

- To the maximum extent practicable, the individual must make a full-time commitment to remain available for service without regard to regular working hours, at all times during his or her period of service, except for authorized periods of leave²⁷
- To the maximum extent practicable, the individual must make a full-time personal commitment to alleviate poverty and poverty-related problems, and to live among and at the economic level of the low-income people served by the project²⁸
- The individual's service cannot be used to satisfy service requirements of parole, probation, or community service prescribed by the criminal justice system²⁹
- A VISTA candidate or member agrees to undergo an investigation into his or her criminal history or background as a condition of enrollment, or continued enrollment, in the VISTA program³⁰

²⁶ [45 CFR §2556.205 \(2016\)](#).

²⁷ [45 CFR §2556.205\(a\) \(2016\)](#).

²⁸ [45 CFR §2556.205\(b\) \(2016\)](#).

²⁹ [45 CFR §2556.205\(c\) \(2016\)](#).

³⁰ [45 CFR §2556.205\(d\) \(2016\)](#).

Sponsors should be well informed about these conditions of VISTA service so that they can discuss them with applicants prior to offering a VISTA position.

Additionally, sponsors define the VISTA member qualifications sought in their project application and in the recruitment listing. CSOs should take into consideration the skills needs to accomplish the VAD and compare that to the qualifications of the applicant in order to determine suitability. Sponsors may decide to narrow the scope and add requirements related to education or experience, for instance.

Eligibility ³¹

An individual may apply to serve as a VISTA as long as: 1) they are at least 18 years when they take the oath of service (there is no upper age limit); and 2) the individual is a United States citizen or national, or a person legally residing within a state.

These are the minimum eligibility requirements that must be met by an applicant to the VISTA program.

AGE REQUIREMENT ³²

VISTA members must but be at least 18 years of age at the time the oath of service is administered. The date of birth field in the MyAmeriCorps portal must be manually verified by CSO staff to ensure the candidate meets the age requirement. There is no upper age limit for VISTA applicants.

CITIZENSHIP REQUIREMENT ³³

To serve in AmeriCorps VISTA positions, individuals must be US citizens, US nationals, lawful permanent residents, or persons legally residing in a state. Persons legally residing in a state include those having the following legal residency classifications:

- refugee status
- asylum or asylee status
- temporary protected status
- deferred action for childhood arrivals (DACA) status

By law, only VISTA members who are either: US citizens; US nationals; or lawful permanent resident aliens (sometimes referred to as “lawful permanent residents”), are eligible to receive an AmeriCorps Segal Education Award in lieu of a cash stipend. Persons legally residing in a state are only eligible to

³¹ [45 CFR §2556.200 \(2016\)](#).

³² [45 CFR §2556.200\(a\) \(2016\)](#).

³³ [45 CFR §2556.200\(b\) \(2016\)](#).

receive a cash stipend.³⁴ CSO staff must notify the VMSU via email if one of your candidates is only eligible to receive a cash stipend.

Since February, 2012, the process for verifying the social security number (SSN) status and citizenship/legal residency status of all VISTA applicants is automated. For US citizens, US nationals, and lawful permanent resident aliens, sponsors are not required to collect citizenship documentation unless the Social Security Administration cannot automatically verify an individual’s citizenship.

For Persons Legally Residing in a State, the Social Security Administration will not be able to verify the individual’s information. CNCS State Offices will receive an automated email regarding the legal residency documentation that is required. The State Office is responsible for contacting the sponsor regarding next steps. The sponsor will need to verify the individual’s documentation and provide (fax) copies of it to the National Service Hotline for processing.

On the applicant’s homepage of MyAmeriCorps, CSO confirms that the citizenship status is verified. If the citizenship status displays as “pending” or “returned” the CSO must follow-up directly with the VISTA candidate and have them resubmit (fax) documentation to the National Service Hotline.

The following information will help expedite the verification process:

- 12-004: Revision – Eligibility Requirements for AmeriCorps VISTA Documentation of U.S. Citizenship/Legal Residency:
<https://cnsgov.sharepoint.com/sites/VISTA/Policy/VISTA%20Policy%20Guidance/Citizenship%20Documentation%20REVISION.pdf>
- All documentation provided to the Hotline must be valid (e.g., non-expired) for the duration of the candidate’s term of service
- There are no exceptions to this requirement
- Identify and Citizenship Verification Process FAQs:
https://www.nationalservice.gov/sites/default/files/documents/id_citizenship_ver_process_faqs.pdf

The chart below details which documentation to submit and eligibility for end of service options based on citizenship status.

VISTA Eligibility Requirements and Documentation of Citizenship/Legal Residence		
Status	End of Service Option	Required to Send Documentation to the Hotline
US citizen	Ed Award or Stipend	Only if Social Security Administration is unable to automatically verify citizenship

³⁴ [45 CFR §2556.320\(g\) \(2016\)](#).

US national	Ed Award or Stipend	Only if Social Security Administration is unable to automatically verify citizenship
Lawful permanent resident alien	Ed Award or Stipend	Only if Social Security Administration is unable to automatically verify citizenship
Person legally residing in a state	Stipend only	Always

On the AmeriCorps Member Application, the applicant is asked to enter his/her citizenship status. The current four options are “US citizen,” “US national,” “lawful permanent resident alien of US,” and “I am an Asylee.” If AmeriCorps VISTA candidates are persons legally residing in a state, but none of these four options apply, they should select “I am an Asylee.” For example, if a candidate has DACA status or refugee status, and is therefore deemed to be a person legally residing in a state, s/he should nonetheless select “I am an Asylee” and add a comment to the “interests” question regarding their status.

Additional guidance on AmeriCorps VISTA U.S. Citizenship/Legal Residency documentation requirements see [Memo 12-004: Revision – Eligibility Requirements for AmeriCorps VISTA Documentation of U.S. Citizenship/Legal Residence](#) and the [SSN and Citizenship Verification Process FAQs](#).

For assistance with completing related member actions in the MyAmeriCorps portal, please refer to the [VMSU Instructions for Processing VISTA Member Actions](#).

OTHER CONSIDERATIONS

Per the [Serve America Act](#) (the Act), national service candidates must undergo a background check and criminal history investigation. A National Service Criminal History Check consists of (1) a State criminal registry search, which involves a search of State law enforcement and court records (by name and/or fingerprint) to determine whether an applicant has a criminal history, and (2) a National Sex Offender Public Registry (NSOPR) check, which consists of individuals that are required by their States to register as sex offenders.

The Act also adds a conviction for "murder," as defined by federal law, as an offense that automatically disqualifies an individual from serving, or working as a grant-funded employee for, a grantee.

Chapter 16 includes details concerning these eligibility considerations and CSO expectations to ensure these checks are completed.

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Chapter 23B: Supporting Members—Benefits

Chapter Owners: VISTA Management and VISTA Member Support Unit

Effective Date: October 15, 2016

Reviewed: September, 2016

VISTA Basic Benefits ³⁵

LIVING ALLOWANCE

The VISTA Living Allowance covers housing, food, utilities, and other basic necessities of service. The amount of the allowance varies depending on location. The rate is based on poverty guidelines for a single individual in the area where the VISTA member or Leader resides.

The Living Allowance is computed on a daily rate and paid every two weeks via direct deposit except in circumstances when this form of payment would cause unusual hardship on the payee. VISTA candidates that will be paid directly by CNCS will set up direct deposit prior to service through their *My AmeriCorps* homepage under 'My Living Allowance'. For hardship cases, the member should click 'Waive direct deposit' and provide a reason. The VMSU will follow-up with the member as needed.

If a VISTA member does not receive a scheduled living allowance via direct deposit, or via mail (for those hardship cases), the member should notify the VISTA Member Support Unit via the National Service Hotline, 800-942-2677. See Ch. 23E – Supporting Members: Emergencies for further information regarding Living Allowance or Other Payment Loss.

LIVING ALLOWANCE OR OTHER PAYMENT LOSS

By law, the Debt Collection Improvement Act of 1996, all individuals receiving federal payments are strongly encouraged to set up a direct deposit or electronic funds transfer (EFT) account to receive federal payments. This includes VISTAs, Leaders, and Summer Associates.

Although the law and regulations require EFT for all federal payments, the regulations provide for an umbrella waiver. Thus, the waiver applies if a VISTA determines:

“...that payment by electronic funds transfer would impose a hardship due to a physical or mental disability or a geographic, language, or literacy barrier, or would impose a financial hardship.”

³⁵ [45 CFR §2556.320 \(2016\)](#).

The My AmeriCorps portal contains a space for the VISTA to state the need for a waiver, and it is automatically given.

Given that nearly all VISTAs receive payments by direct deposit or in an EFT account, the chance of lost payments is minimized greatly. Missing payments occur most commonly when VISTA members enter incorrect direct deposit information into their my.americorps.gov accounts. If the allowance payment does not arrive on time, the VISTA member notifies the VMSU, and the VMSU verifies that the direct deposit and/or pay address information is correct in the Portal.

If a VISTA's paper living allowance check is lost or stolen before it is cashed, the VISTA immediately notifies the State Office by phone. The VISTA must then report the loss in writing, indicating the pay period covered, and mail or email the statement to the VMSU. The VMSU will contact the Headquarters payroll office (VISTAHD) to begin tracing the lost check.

If the check has been lost and there is reason to believe it has been cashed by an unauthorized individual, the VISTA must complete a Treasury Claim Form and send to the VMSU for processing. VISTAHD obtains the Treasury Claim Form from the Department of Treasury and forwards it to the VISTA.

VISTAHD notifies the U.S. Treasury of the loss and arranges for reissuance of the check after the appropriate documentation has been received. VISTAs and former VISTAs will not receive a replacement check until the investigation and research have been completed. This process may take up to six weeks.

When a check is reissued, a receivable is created, causing an overpayment to the VISTA. If the VISTA recovers a check previously reported lost or stolen, the VISTA must immediately notify the VMSU and return the check to the VMSU. The VMSU notes receipt of the check and forwards the check to Headquarters accounting office, which then removes the receivable from the VISTA's record.

Health Benefit

VISTA members become eligible for health care benefits upon swearing-in and official enrollment in the VISTA program. At the discretion of VISTA, coverage for medical emergencies may be provided at PSO prior to enrollment in the VISTA program. Coverage ends the last day of service and the plan covers only the VISTA. See Chapter 24: Health Care and Child Care Benefits for further information.

Leave Time

VISTA members receive personal, medical, emergency, and holiday leave. VISTAs must seek approval for leave from their sponsoring organization/supervisor for personal leave and provide notice when possible of medical and emergency leave.

See Chapter 23C: Supporting Members: Leave for VISTAs and Leaders for further information.

Training

As a benefit of VISTA service, VISTAs have several training opportunities:

- **Pre-Service Orientation (PSO)** – Formal training that introduces the candidate to VISTA, its mission, history, and policies, and VISTA member roles and responsibilities. See Chapter 18: Managing Pre-Service Orientation and Supervisor’s Training for further information
- **On-Site Orientation and Training (OSOT)** – Supervisor-led training to familiarize the VISTA with the sponsoring organization, project, community, and specific tasks required of the VISTA. See Chapter 20: On-Site Orientation & Training for further information

Employees’ Compensation³⁶

Under section 415(b) of the Domestic Volunteer Service Act of 1973, as amended (42 U.S.C., § 5055), AmeriCorps VISTA members are considered employees of the federal government for the purpose of coverage under the Federal Employees' Compensation Act (FECA), which is administered by the Office of Workers' Compensation Programs (OWCP) of the U.S. Department of Labor. The Department of Labor's OWCP office is solely responsible for the adjudication of FECA claims. This means that members are eligible for certain benefits in certain situations, and eligibility is determined by OWCP, not CNCS. Coverage by FECA begins for AmeriCorps VISTA members after they are enrolled (sworn in) in the AmeriCorps VISTA program.

Benefits approved under FECA begin after termination from AmeriCorps VISTA service and include payment for continuing medical care and compensation for wage loss and permanent impairment of certain members or functions of the body in the event of a service-related disability. FECA also contains provisions for payment of certain death benefits, such as shipment of the body, funeral and burial costs, and survivor's benefits if the member's death results from an injury or illness sustained in the performance of official project duties.

See Chapter 23E, Member Emergencies for Claims Procedures.

CLAIM PROCEDURES

VISTAs who are injured or experience an emergency illness related to their assignment must immediately notify the project supervisor and the CNCS State Office. The CSO then provides the VISTA with either of the following forms to complete and return to the CSO:

³⁶ [45 CFR §2556.300 \(2016\)](#).

- [Form CA-1, Notice of Traumatic Injury](https://www.dol.gov/owcp/regs/compliance/ca-1.pdf) (<https://www.dol.gov/owcp/regs/compliance/ca-1.pdf>), which is filed with the OWCP when an accident or physical injury occurs during performance of VISTA duties.
- [Form CA-2, Notice of Occupational Disease or Illness](http://www.dol.gov/owcp/regs/compliance/ca-2.pdf), (<http://www.dol.gov/owcp/regs/compliance/ca-2.pdf>), which is filed with the OWCP when a disease or illness is suspected of being caused by job performance.
- Fillable forms may be obtained online at: <http://www.dol.gov/owcp/dfec/regs/compliance/forms.htm>

TO FILE A CLAIM:

1. The completed CA-1 or CA-2 with supporting documentation should be first submitted to the CSO as soon as possible (upon notification of an injury or accident).
2. The CSO should then submit the documentation to VISTA HQ via the VISTA POC for Worker's Compensation above.
 - a. Documentation should be sent via secure email to jveazey@cns.gov for timely filing.
3. The VISTA POC for Worker's Compensation will review documentation for legibility and completion as well as include VISTA's unique OWCP Code.
4. Documentation will be submitted to OWCP for review and processing. All communication thereafter is between OWCP and the VISTA member.

It is important to note that while a VISTA is in service, all medical claims, even for injuries and illnesses for which a worker's compensation claim has been submitted, should be sent to the AmeriCorps Health Benefits Administrator (currently International Medical Group).

Chapter 8 of the *AmeriCorps VISTA Member Handbook* outlines the employees' compensation procedures.

TIPS FOR COMPLETING FORM CA-1 OR CA-1

Although an illness or injury may not appear to be serious enough to result in compensation eligibility, VISTA members should complete the claim forms to protect their rights in case future complications develop.

- Members have **up to three years** from the date of injury or up to three years from the date they realize their assignment caused an injury to request that their completed form be filed with OWCP
- **Both pages 1 & 2 must be completed** with relevant information (there may be portions that are not applicable to VISTAs)

- **Forms must be legible;** it is strongly recommended that members utilize the fillable forms online when possible
- **Illegible and/or incomplete forms will be returned** by CNCS or OWCP for updating and refiling; illegible forms can delay the overall processing of FECA claims
- FECA Claims **MUST include the signature of the VISTA member along with date**, on page 1.
- FECA Claims **MUST include the signature of a supervisor**. For VISTA members, the supervisor may be from your sponsoring organization or from the State Office
- Members must **attach all relevant information** with CA-1 or CA-2 such as a copy of the initial claim from the doctor/hospital that verifies that an injury occurred and required medical attention. Including supportive documentation will help ensure paperwork is able to be processed in a timely manner
- Once a claim has been filed with and processed by the Office of Workers' Compensation Programs (OWCP), a notification will be sent to the member from OWCP with a status of the claim (denied, approved or incomplete). The notice will explain what additional information is required for the claim to be processed if it is incomplete or provide instructions for accessing benefits. Notification will come in the mail so it is important that the member includes an updated mailing address on the CA-1 or CA-2.

SUBMITTING THE CLAIM

Filing a claim for worker's compensation is not common, and neither the VISTA nor the CSO can be expected to remember all of the steps or how the claim process works. The CSO should feel free to contact the VISTA HQ Worker's Compensation Point of Contact with questions or concerns at the following contact information:

Jennifer Veazey
 AmeriCorps VISTA Point of Contact for Worker's Compensation
 Corporation for National & Community Service
 250 E Street, SW - Suite 300 (Room 3213B)
 Washington, DC 20525
 202-606-6770
jveazey@cns.gov

VISTA Optional Benefits

RELOCATION AND SETTLING-IN ALLOWANCES

The VISTA program provides relocation assistance to VISTA candidates, VISTAs, and Leaders who are approved to relocate a distance greater than 50 miles from their home of record (HOR) to the community where they will serve.

VISTAs and Leaders who relocate to serve are eligible for a one-time Settling-In Allowance of \$550. This payment is only for those individuals approved to relocate at the beginning of their service; this one-time Settling-In Allowance is not awarded again when they return home. These funds are meant to defray costs for initial expenses, such as connecting electricity, security deposits on an apartment, etc.

See Chapter 23D: Supporting VISTAs: Travel and Service-Related Transportation for more information.

SERVICE-RELATED TRANSPORTATION AND REIMBURSEMENT

For an AmeriCorps VISTA member to perform the project assignment effectively, transportation may be essential. The sponsoring organization is responsible for determining the service-related transportation needs of members. As a general rule, VISTAs are expected to use public transportation when it is available and adequate.

When public transportation is not available or adequate, the sponsoring organization is responsible for providing or supporting vehicles used by members in the performance of their assignments. In some instances, AmeriCorps VISTA may assist the sponsoring organization by providing funds for mileage reimbursement or for leasing a vehicle. In these cases, the sponsor makes arrangements with the CNCS State Office.

See Chapter 23D: Supporting VISTAs: Travel and Service-Related Transportation for more information.

PROTECTION OF PUBLIC ASSISTANCE AND PUBLIC BENEFITS

In accordance with federal law, payments received by a VISTA through the VISTA program do not reduce or eliminate the level of, or eligibility for, assistance or services that a VISTA may be receiving or is eligible to receive under any federal, state, or local government assistance program. This statutory provision is designed to ensure that persons receiving assistance before joining VISTA do not lose benefits or have them reduced as a result of their service.

See Ch. 23E – Supporting Members: Emergencies for procedures regarding Reduction of Public Assistance Benefits and [Chapter 14: Basic Laws & Federal Regulations](#) (<https://www.vistacampus.gov/chapter-14-basic-laws-federal-regulations-0>) of the *AmeriCorps VISTA Member Handbook* for more information.

CHILD CARE

A child care subsidy is available to VISTAs and Leaders (not Summer Associates) who satisfy the following requirements:

- The VISTA member's household income does not exceed the limit determined by the state in which the child care is provided. This limit is different for each state and may change annually. In determining household income, the VISTA's living allowance is disregarded

- The VISTA does not already receive a child care subsidy from another source
- The child must be under age 13

[GAP Solutions, Inc.](http://www.americorpschildcare.com/) (<http://www.americorpschildcare.com/>) administers the child care benefits program for AmeriCorps VISTA.

See Chapter 24: Health and Child Care Benefits for more information.

LIFE INSURANCE

VISTAs and Leaders (not Summer Associates) may purchase life insurance under a group policy with the Reliance Standard Insurance Company. Enrollment is voluntary and takes place in the My AmeriCorps portal. The premium, \$2.07 per pay period, is deducted from the VISTA's living allowance. Coverage begins at the time of enrollment in the plan.

See Ch. 23E – Supporting Members: Emergencies for further information regarding Life Insurance and how it pertains to Total Disability and Terminal Illness and Death in Service.

COLD WEATHER GEAR

For a VISTA member to perform the project assignment effectively, cold weather gear may be essential. Cold weather gear includes clothing and engine block heaters. VISTA assists nationally recruited VISTA members relocating to serve in North Alaska (Fairbanks and vicinity) in purchasing cold weather gear, should they need such financial support.

The CSO considers requests for cold weather gear for service sites other than the North Alaska on a case-by-case basis.

The VISTA member or sponsor contacts the CSO to request reimbursement for cold weather gear expenses. The CSO submits an [Emergency Funds Request Form](http://portal.cns.gov/Portals/0/Emergency%20Travel%20Request%20Form.pdf) (<http://portal.cns.gov/Portals/0/Emergency%20Travel%20Request%20Form.pdf>) to the VMSU, which sends a voucher to the member if the request falls within policy. The VISTA member signs the voucher, attaches receipts, and returns it to the VMSU for reimbursement.

VISTA requires legible receipts in the VISTA member's name to be submitted to the VMSU within 30 days of the first day of service. Claims for purchases after the initial 30 days of service are not reimbursable. Reimbursement must not exceed \$275.

Sponsor Support Benefits

Sponsors may provide financial or in-kind support to VISTAs in addition to the support provided by the VISTA program. This support must meet the following conditions:

- Support is offered and available equally to all VISTA members at a site
- Cash or checks (unless for reimbursable expenses) are not given directly to the VISTA member
- Support offered does not violate VISTA’s legislation that mandates VISTAs must, to the maximum extent practicable, make a commitment to live among and at the economic level of the people served

A list of common support sponsors may provide to VISTAs can be found in Appendix 23B-1.

VISTA Education Benefits

ELI SEGAL AMERICORPS EDUCATION AWARD OR END-OF-SERVICE STIPEND

VISTAs that successfully complete their VISTA service are eligible for either an Eli Segal AmeriCorps Education Award or an End-of-Service Stipend. The selection of an end-of-service benefit is automated through My AmeriCorps. After placement by the CSO, a VISTA candidate should complete the online Benefits Election Form through My AmeriCorps. This form gives them the choice to select either the Eli Segal AmeriCorps Education Award or the end-of-service stipend. The VISTA cannot choose both.

At any time prior to the end of the tenth month of service, VISTAs who initially elect the Eli Segal AmeriCorps Education Award can change their decision and elect the end-of-service stipend instead. If they initially elected the end-of service stipend, they cannot switch to the Education Award. However, the same does not hold true for Summer Associate members; Summer Associates are unable to switch and must keep their initial benefit selection.

STUDENT LOAN FORBEARANCE AND DEFERMENT

Loan Forbearance. VISTA members who select the Education Award as their end-of-service option are eligible for federal student loan forbearance based on “national service”. During forbearance, interest continues to accrue. For VISTAs who successfully complete their term of service and earn an Education Award, the National Service Trust pays all or a portion of the interest that accrued on qualified student loans during this period. The process for requesting loan forbearance is automated through My AmeriCorps.

Loan Deferment. VISTA members who select the end-of-service stipend as their end-of-service option are eligible for deferment of monthly payments on federal student loans based on “economic hardship.” For federal subsidized loans, accrued interest will automatically be paid by the Department of Education. VISTAs who successfully complete their term of service may also be eligible for a cancellation of part of their Perkins Loans. The process for requesting loan deferment is dependent on the lender. VISTAs should contact their lender to confirm eligibility and obtain forms.

See Chapter 25: Eli Segal AmeriCorps Education Awards and National Service Trust for further information.

VISTA Post Service Benefits

NONCOMPETITIVE ELIGIBILITY

VISTAs that successfully complete their one-year VISTA service term attain noncompetitive eligibility (NCE) status for one year following their completion of VISTA service. As set forth in federal law, such individuals “shall be eligible for appointment in the Federal competitive service in the same manner as Peace Corps Volunteers as prescribed in Executive Order No. 11103 (April 10, 1963),” Section 415(d), Title IV, of the Domestic Volunteer Service Act of 1973, as amended.

This one-year NCE status starts on the date of completion of service and expires a year later. VISTAs who have completed less than one year of service (including training time) will not receive NCE status.

See Chapter 28: AmeriCorps VISTA – Life After VISTA for further information.

FEDERAL CIVIL SERVICE CREDIT

AmeriCorps VISTA service is creditable toward a pension in the Federal Employees Retirement System, provided the Member pays a portion of the retirement contribution to the U.S. Office of Personnel Management. The payment is based upon a statutorily mandated percentage of the stipend payment. The Education Award, like the stipend, is considered a form of payment. Therefore, AmeriCorps VISTA members who elect the Education Award also will be required to make the same percentage cash payment to their retirement account as if they had actually received the stipend.

The service credit deposit payment should be made within two years of the VISTA alumnus becoming a federal employee. If the payment is delayed for a period greater than two years, interest will be payable. VISTA alumni who become federal employees must contact the Human Resources/Benefits personnel at their current federal agency to initiate the deposit process.

AmeriCorps VISTA service may be credited in connection with subsequent federal employment in the same manner as a like period of regular civilian employment by the federal government. AmeriCorps VISTA service will apply toward purposes of determining seniority, reduction in force and layoff rights, leave entitlement, and other rights and privileges based on length of service under laws administered by the U.S. Office of Personnel Management and other laws establishing terms and conditions of service of federal civilian employees.

AmeriCorps VISTA service, however, is not credited toward completion of any probationary or trial period, or completion of any service requirement for a career appointment.

Members have access to their Service Verification letter upon completion via [My.AmeriCorps.gov](https://my.americorps.gov) (<https://my.americorps.gov/>). This details their eligibility for retirement credit.

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Chapter 23C: Supporting Members – Leave for VISTAs and Leaders

Chapter Owners: VISTA Member Support Unit

Effective Date: October 15, 2016

Reviewed: September, 2016

Overview of Leave

VISTAs and Leaders have leave benefits as described in this chapter. The chapter begins with a chart that summarizes the various types of leave, and follows with narrative to guide the CNCS State Office (CSO) in applying the leave benefits to specific circumstances. In the chapter, a workday is equivalent to the sponsor’s typically required workday.

Leave type	Total workdays	Conditions
National holiday	Only those followed by sponsor staff	
Personal	10 workdays in a full year of service	Generally, leave in first 3 months or last month is limited to emergencies and family matters. If the VISTA reenrolls or is reinstated, the VISTA is entitled to unused personal leave earned in the prior term of service. Must be taken in accordance with sponsor policies.
Personal in an extension of service	1 workday per 30 additional days of service	The VISTA is entitled to any unused personal leave earned in the prior term of service.
Medical	10 workdays in a full year of service	If the VISTA reenrolls or is reinstated, the VISTA is entitled to any unused medical leave earned in the prior term of service. Must be taken in accordance with sponsor policies.
Medical in an extension of service	1 workday per 30 additional days of service	The VISTA is entitled to any unused medical leave earned in the prior term of service.

Leave type	Total workdays	Conditions
Extended medical leave benefits	Must use all personal and medical leave first Up to 5 workdays in a full year of service	SPD may approve up to an additional 5 workdays for a total of 15 medical workdays in a full year of service in cases where extended recuperation is required.
Parental leave (birth/adoption)	Must use all personal and medical leave first Up to 10 workdays in a full year of service	SPD may approve up to an additional 10 workdays, for a total of 30 workdays, if required.
Emergency	Up to 5 workdays	Sponsor may allow if: natural disaster requires leaving the site; immediate family member becomes critically ill or dies. Sponsor must notify SPD.
Jury duty	As necessary	
Military reserve	As required by the military	

National Holiday Leave

A VISTA enjoys the national holidays that are recognized by the sponsor and are given as time off to the rest of sponsor’s personnel. A VISTA must serve on federal holidays that are not recognized by the VISTA’s sponsoring organization. For example, if the sponsor denotes Veterans Day as a workday for its staff, a VISTA is expected to serve on that day unless the VISTA has requested and received approval for one day of personal leave.

If the sponsor provides its staff additional “floating holidays,” “spring breaks,” “summer recesses,” etc., the VISTA is expected to continue to serve on the assignment unless authorized to take the time off as part of personal leave. The VISTA should consult with his/her supervisor regarding assignments during these periods.

When the federal government is shut down through Executive Order by the President, the VISTA must: 1) continue to serve and adhere to the leave policies of the VISTA’s sponsoring organization, and 2) not exceed the allowable leave time provided by the VISTA Program. The sponsor must monitor the attendance of its VISTAs.

Personal Leave

A VISTA is entitled to ten workdays of personal leave during each full year of service.

A VISTA extending service beyond the full year of service earns one workday of personal leave for every 30 or more additional days of service. If the VISTA reenrolls or is reinstated, the VISTA is entitled to any unused personal leave earned in the prior term of service.

The VISTA must request and receive approval in advance from the sponsor/supervisor for all personal leave, specifying dates of leave requested in accordance with sponsor policy. **Leave should not interfere with a VISTA settling-in and becoming oriented to the site, or with closing service and transitioning from the sponsor.**

While on personal leave, the VISTA continues to receive all regular allowances. CNCS does not pay travel expenses for personal leave.

Medical Leave

A VISTA is entitled to ten workdays of medical leave during each full year of service for illness, injury, or medical appointments.

A VISTA extending service beyond the full year of service earns one workday of medical leave for every 30 or more additional days of service.

If the VISTA reenrolls or is reinstated, the VISTA is entitled to any unused medical leave earned in the prior term of service.

When possible, the VISTA should request approval in accordance with sponsor policy for medical leave in advance and should specify the hours or dates of leave requested.

The sponsor/supervisor should notify the CSO immediately if it appears that a VISTA may not be able to resume project duties within the maximum medical leave period of ten workdays. At that point, the CSO should consult with the appropriate Area Manager and consider a medical termination of the VISTA regardless of the number of medical or personal leave days the VISTA has remaining.

1. Medical leave (up to 10 days)
2. Personal leave for remaining time (up to 10 personal leave days)
3. Up to five days of extended medical leave awarded by the State Program Director

If circumstances require a VISTA to extend the recuperation period, the VISTA must notify the sponsor/supervisor at once, and if requested, provide the sponsor/supervisor with evidence of the need. The sponsor must inform the CSO and request the CSO to approve the five days of extended medical leave.

In the event the VISTA returns to work before exhausting the all five days of extended medical leave, the CSO may award the remaining days in the future should the VISTA need them.

Example:

1. A VISTA goes out on medical leave and exhausts all 10 medical leave days and 10 personal leave days
2. The SPD grants five days of extended medical leave. The VISTA returns to service after using only two days of extended medical leave
3. Hence, the VISTA uses a combination of 22 leave days

The VISTA becomes sick again later in service. The SPD may award the three remaining days of extended medical leave should the need arise. If the VISTA does not return to work after exhausting all leave, termination for compelling personal circumstances-medical is applied.

Emergency Leave

The sponsor may allow up to five workdays of emergency leave under two circumstances: (1) if an immediate family member (spouse, parent, sibling, child, grandparent, or guardian) becomes critically ill or dies; and (2) if a natural disaster requires that the VISTA leave the site. Any additional time away from the project requires the approval from the SPD. Emergency leave does not count against a VISTA's personal leave time.

If circumstances require a VISTA to take emergency leave, the VISTA must notify the sponsor/supervisor at once, and if requested, provide the sponsor/supervisor with evidence of the emergency. The sponsor must inform the CSO immediately, if the sponsor determines an emergency exists. See Chapter 23E – Supporting Members: Emergencies for more information.

Jury Duty

A VISTA may be subject to jury duty. A sponsor must give a VISTA the necessary time away from project duties to comply with jury duty requirements. All regular benefits continue during the period of jury duty. Time on jury duty is not counted against the VISTA's personal leave, term of service, or end-of-service benefit. The VISTA should provide a copy of the summons to the sponsor/supervisor.

The sponsor/supervisor should notify the CSO immediately if it appears that a VISTA may not be able to resume project duties within two weeks of starting jury duty. At that point, the CSO should consider a break in service for compelling personal circumstances. See the section below on "Extended Leave and Reactivation".

If the VISTA is subpoenaed on a non-project-related matter, the VISTA is required to use personal leave.

Military Reserve Leave

If a VISTA enters VISTA service before completing a military reserve obligation, the VISTA must change the location of their reserve unit if necessary. VISTA members should try to minimize the disruption in VISTA service as a result of discharging responsibilities related to their reservist duties. If allowed to choose when to fulfill the annual two weeks of active duty requirement, VISTA members should choose a period that does not disrupt their VISTA service.

A member is granted military reserve leave to attend the monthly reserve training sessions and the two weeks of active duty training. Such leave does not count against a member's personal leave, term of service, end-of-service stipend, or Education Award. VISTA members should notify the sponsoring organization/supervisor before taking military reserve leave and upon returning from such leave. VISTA members may not receive time off for active duty or other reserve-related service beyond the two weeks and the monthly training activities usually required for reserve status. Any other reserve-related service does not apply to AmeriCorps VISTA service time for purposes of the Education Award. The sponsoring organization/supervisor notifies the CSO of the exact dates of military reserve leave.

Parental Leave

A VISTA is entitled to use a combination of medical and personal leave (20 workdays) for the birth or adoption of a child. The SPD may approve an additional 10 workdays, for a total of 30 workdays, if required. No additional leave is granted in the event of a birth or adoption of child.

Family Medical Leave Act

The [Family Medical Leave Act \(https://www.opm.gov/policy-data-oversight/pay-leave/leave-administration/fact-sheets/family-and-medical-leave/\)](https://www.opm.gov/policy-data-oversight/pay-leave/leave-administration/fact-sheets/family-and-medical-leave/) (FMLA) is a federal law that provides certain employees in the United States with up to 12 weeks of unpaid leave per year for care of a covered family member and up to 26 weeks of unpaid leave per year to care for a [covered armed service member \(https://www.dol.gov/WHD/fmla/2013rule/\)](https://www.dol.gov/WHD/fmla/2013rule/). The Serve America Act of 2009 Amendments to the National Community Service Act of 1990 extended FMLA protections to certain AmeriCorps and VISTA members. For the VISTA program, FMLA is a leave-without-pay status.

Very few VISTA members are eligible for FMLA leave. For example, to be eligible a VISTA member must be at least in the second year of VISTA service with the same sponsor, and there are other baseline requirements for eligibility. A VISTA member who is eligible for and takes "FMLA leave" remains enrolled in the VISTA program, continues to receive health coverage, and stays assigned to a VISTA project while taking the leave, but does not receive a living allowance. Further, member benefits and other allowances (child care, life insurance, accrual of the VISTA's post-service award [i.e., Education Award or end-of-service stipend]) are suspended while on FMLA leave. The VISTA's position at the assigned

project remains available when the VISTA returns. The VISTA's position cannot be abolished or given to someone else in his/her absence. Upon return to the project, the VISTA resumes receipt of all VISTA program benefits that were suspended during FMLA leave, including the living allowance.

Applying FMLA to the VISTA program poses complex legal and programmatic issues. When an FMLA question arises, CSOs must consult with the Office of General Counsel in coordination with VISTA HQ. It is necessary to conduct fact-specific analyses, on a case-by-case basis, to resolve questions of FMLA eligibility and compliance. For further information, see Appendix 23C-1: FMLA Eligibility and Compliance.

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Chapter 23D: Supporting Members—Travel and Service-Related Transportation for VISTAs and Supervisors

Chapter Owners: VISTA Member Support Unit

Effective Date: October 15, 2016

Reviewed: September, 2016

Introduction

This chapter presents guidance and procedures related to travel for VISTAs and Leaders, including relocation for national recruits, as well as travel for supervisors attending training.

The chapter distinguishes between two terms: travel and service-related transportation. Travel refers to the approved travel to and from the project site (for VISTAs and Leaders relocating from their home of record) and approved travel to and from training events or other CNCS-sponsored events. Service-related transportation means transportation connected with fulfilling the VISTA service duties at the project site.

Travel Support³⁷

The VISTA program pays for, and reimburses costs related to, the approved official travel of VISTA candidates, VISTAs, Leaders, and supervisors. In this chapter, the term “traveler” is used when information applies to all these groups. “Training” refers to Pre-service Orientation (PSO), Supervisors Orientation (SO), and Leaders Orientation.

The VISTA Training Unit (VTU) and VISTA Member Support Unit (VMSU) review and approve the proposed travel in terms of route, mode of transportation, and dates of travel. The VMSU reviews and approves relocation travel for VISTA candidates that relocate for service. The VTU reviews and approves travel to training for non-relocating VISTA candidates.

Official travel for supervisors refers to travel associated with attending the Supervisors Orientation.

Official travel for VISTA candidates, members, and Leaders includes:

³⁷ [45 CFR §2556.315 \(2016\)](#).

- Travel from and to their home of record (defined below) for relocating VISTAs and Leaders
- Travel to CNCS-sponsored or CNCS-approved training events
- Emergency travel (see VDR Chapter 23E: Supporting Members – Emergencies)

The VISTA program covers expenses for official travel within the continental United States, as well as for official travel by those who serve in or whose home of record (HOR) is in Alaska, Hawaii, Puerto Rico, the Virgin Islands, Guam, American Samoa, and the Northern Mariana Islands.

Travelers receive partial and/or actual reimbursement to off-set expenses they incur while on authorized travel. Travelers receive reimbursement via direct deposit to their bank account. If a traveler does not establish direct deposit, or if there is a problem in issuing the reimbursement via direct deposit, CNCS mails the check to the project site (in the case of a VISTA) or home address (in the case of a supervisor).

All travel payments are subject to the Treasury Offset Program, which means the U.S. Department of Treasury may garner travel reimbursements to collect debts owed to the United States.

Travel to Pre-Service Orientation or Training

The AmeriCorps VISTA program arranges and pays for a cost-effective means to travel to Pre-Service Orientation (PSO), Supervisor Orientation (SO), and Leaders Orientation for all authorized travelers—candidates, members (including Leaders), and supervisors. Individuals authorized to travel to training must do so in a manner that is cost-effective, while recognizing issues of safety and travel time.

REQUESTING TRAVEL TO TRAINING

VISTA candidates and VISTA members not relocating to a project site request travel to attend a training event by completing the Travel Request Profile (TRP) in the [My AmeriCorps Portal](https://my.americorps.gov/) (<https://my.americorps.gov/>).

Supervisors request travel to attend a Supervisors Orientation by completing the Trainee Profile in eGrants. Supervisor instructions for completing the Trainee Profile are available on the VISTA Campus: <https://www.vistacampus.gov/resources/enrolling-supervisors-orientation-using-egrants>.

The traveler indicates on the TRP (or the Trainee Profile for supervisors) the preferred mode of travel, the departure city, and other information that will help the technical assistance provider arrange travel. Final approval however, rests with the VTU or the VMSU.

TIMELINES FOR REQUESTING TRAVEL TO TRAINING

The traveler must complete the TRP (or Trainee Profile) no later than the deadline for enrolling participants of the training event for which the traveler is scheduled to attend (typically 35 calendar

days prior to the first day of the training event). Travelers must submit any requests to change modes of travel or routing to the Training Unit no later than ten (10) calendar days before departure. Changes are subject to approval by the Training Unit.

PROCESSING TRAINING TRAVEL REQUESTS

Candidates must complete their TRP no later than 35 days prior to the start of PSO. The VISTA Training Unit reviews all requests for cost-effectiveness and adherence to VISTA travel policy. The Training Unit contacts candidates directly if there are any changes to the preferred mode of travel or routing indicated by the traveler in the TRP.

PREFERRED MODE OF TRAVEL

Travelers indicate their preferred mode(s) of travel on their TRP for travel to and from training. Given the schedules of commercial carriers and fares from particular locations, the preferred mode may not be reasonable or cost effective. The Training Unit determines whether the preferred mode is the most economical mode of travel. Travel by privately owned vehicle (POV), for example, can be far more expensive than travel by commercial carrier in one circumstance, and cost effective in another. Similarly, airfare from regional airports can be exorbitant, whereas airfare from hubs and major city airports are usually more economical.

TRAVEL BY COMMERCIAL CARRIER

Travel via commercial carrier (plane, train, or bus) is at the lowest available government rate. About five to ten days before the training event, the CNCS travel contractor sends the traveler a prepaid ticket, typically in the form of an e-ticket. In some cases, such as travel by a bus line that does not have a contract with the CNCS travel agency, CNCS may ask a candidate to purchase a ticket and be reimbursed. In such cases, the Training Unit informs the candidate of the policy and eligibility for reimbursement before the candidate purchases a ticket. After the candidate purchases the ticket, the candidate must forward the itinerary and receipt to the Training Unit. The itinerary is necessary for the coordination of ground transportation to the PSO venue; the receipt is required for reimbursement.

Travelers who drive to the airport, train station, or bus depot are reimbursed at the current VISTA mileage rate for direct-route mileage between the home of record and the airport or station.

TRAVEL BY PRIVATELY OWNED VEHICLE

The CNCS reimburses candidates who drive to PSO, as well as supervisors who drive to SO, for direct-route mileage or for the cost of the commercial carrier, whichever is less. The VMSU determines the mileage amount for the most direct route from departure to destination point, using the Google Maps mileage calculator. VISTA policy defines the mileage reimbursement rate, which is based on the mileage rate for relocation by POV established by the GSA, as outlined in the Federal Travel Regulations.

OTHER TRAVEL EXPENSES

In most cases, travelers are reimbursed for actual travel expenses incurred, such as taxi fares, tolls, or parking fees. The VISTA program may request receipts in all cases, but requires receipts when a specific travel expense costs greater than \$75, e.g., bus fare the candidate was pre-approved to purchase on their behalf.

Travelers are reimbursed for parking fees (e.g., at the airport or PSO hotel), up to \$50, when free parking is unavailable. The welcome packet sent in advance of travel informs travelers of the reimbursement limit and requests that they must park in economy or long-term parking at the airport or other specified location. At PSO or SO registration, VISTA candidates and supervisors must provide evidence (such as a printout from the airport website) of the daily parking rate for the airport where they parked. A CNCS employee records this rate on the travel voucher as verification for reimbursement.

For further details, see VDR Chapter 18: Managing Pre-Service Orientation and Supervisors Orientation/Training Registration and Travel Arrangements.

TRAINING SUBSISTENCE

Travelers receive a training subsistence payment for authorized travel in accordance with VISTA policy. Training subsistence covers incidental expenses and meals needed on travel days to and from the training event, and incidental expenses during the training event. Local candidates (those who travel fewer than 50 miles to the training site) and VISTA candidates attending PSO en route to their site (relocating through PSO) do not receive the training subsistence payment. For details, see VDR Chapter 18: Managing Pre-Service Orientation and Supervisors Orientation/Training Registration and Travel Arrangements.

Relocation Travel and Reimbursement

Relocation travel is all travel approved by the VMSU for VISTA candidates and members who move from 50 miles or more from their home of record (defined below) to serve. VISTA candidates must relocate in a manner that is most cost-effective for the VISTA program.

VISTA candidates approved by the VMSU to relocate to serve are eligible for a Relocation Travel Allowance intended to offset the cost of relocating to serve and the cost of shipping personal effects between home of record and site. The relocation travel allowance, established by the VISTA program, is based on the mileage between the home of record and site, not to exceed \$1,000.00. The relocation travel allowance includes:

1. A relocation mileage rate set by the VISTA program
2. A shipping rate for personal belongings set by the VISTA program (10 cents per mile)

Example:

Relocation Rate	Shipping Rate	Total Relocation Travel Allowance
\$0.24/mile	\$0.10/mile	\$0.34/mile

For return travel to HOR from site, please see Close-of-Service Travel below.

DEFINITION OF HOME OF RECORD

The home of record (HOR) is an individual’s legal residence at the time the CSO approves the individual to be accepted into VISTA program, as indicated in the “Permanent Residence” field of the My AmeriCorps Member Homepage.

The HOR approved at the start of service may not be changed without the written authorization of the Director of VISTA Member Support Unit. The HOR may not be altered after the tenth month of service. If CSO staff feel a VISTA has compelling reasons to change the HOR, the CSO should email the change request to the VMSU before the tenth month of service for the VISTA in question. The email should justify the need for change and include a details provided by the sponsoring organization and/or VISTA.

ROUTING FOR RELOCATION TRAVEL

Candidates indicate their routing preference on the TRP:

- Relocate prior to PSO: Travel from HOR to Site, and then round-trip to PSO
- Relocate after PSO: Round-trip travel from HOR to PSO, and then travel to site
- Relocate through PSO: Travel from HOR to PSO to Site. Travelers who are approved to relocate through PSO are responsible for coordinating and booking all of their own travel and are reimbursed based on mileage from HOR to PSO to Project Site

The VMSU approves all relocation routes based on what route is most cost effective and documents the decision in the member file at the VMSU.

VISTA candidates who relocate outside of policy (i.e. relocate before receiving routing approval from the VMSU) are liable to lose a portion or all of their relocation travel benefits and settling in allowance. The Director of the VMSU, in collaboration with the Deputy Director of VISTA, has final authority in resolving disputes concerning relocation travel reimbursement.

REQUESTING RELOCATION TRAVEL

Candidates attending an in-person PSO request relocation travel by completing a Travel Request Profile (TRP) via [MyAmeriCorps \(https://my.americorps.gov\)](https://my.americorps.gov). Candidates indicate their HOR, preferred dates of

travel, and preferred travel route (prior, through or after PSO). The VMSU reviews and approves the candidate's relocation travel.

Candidate's attending PSO Blend are not required to request relocation travel through the TRP. All candidates who attend an online PSO are approved to relocate prior. Candidates must still wait for an automated approval email from the VMSU before physically relocating. The VMSU automatically calculates relocation reimbursement based upon these candidates' HOR and project site as listed in [My.AmeriCorps.gov](https://my.americorps.gov) (<https://my.americorps.gov>).

TIMELINES FOR REQUESTING RELOCATION TRAVEL

Candidates must complete the TRP no later than 35 days prior to the first day of PSO the candidate is scheduled to attend. Candidates who are training deferred or reinstated must complete the TRP no later than 10 days before departure from HOR or 35 days prior to the first day of PSO, whichever is sooner. The VMSU will complete TRPs for PSO Blend attendees who relocate.

PROCESSING RELOCATION TRAVEL REQUESTS

The VMSU reviews all requests for cost-effectiveness and adherence to VISTA relocation travel policy and calculates the Relocation Travel Allowance for which the candidate is eligible.

The VMSU contacts all candidates to give final approval for the candidate to travel. If a candidate's preferred travel routing (prior to, after, or through PSO) results in higher costs for PSO travel, the VMSU denies the request and presents alternative options to the candidate.

MODES OF RELOCATION TRAVEL

Candidates arrange and initially pay for their relocation travel. The VMSU informs the candidate of the reimbursement she or he is entitled to and the candidate makes an informed decision regarding the mode of travel she or he will use to travel from HOR to service site.

TRAVEL TIME TO SERVICE SITE

A candidate approved to relocate prior to PSO may establish residency, but may not serve at the sponsoring organization, unless the candidate is training deferred.

A candidate who relocates to a service site prior to the CSO's approval to serve is not eligible for the relocation travel allowance or settling-in allowance, and is viewed as a locally recruited candidate.

A VISTA member approved to relocate after PSO or through PSO is permitted reasonable time to travel safely and directly to the project site from PSO. Travel time shall not exceed five business days after PSO. Further, sponsors will permit VISTA members reasonable time to establish a new address or

residency upon arriving at the project site. The VISTA program expects the sponsoring organization to assist the member in locating and settling into his or her new residence.

ASSISTANCE IN CIRCUMSTANCES OF FINANCIAL HARDSHIP

Candidates may appeal to the Director of the VMSU to provide additional relocation assistance under the following circumstances:

- VISTA candidates who are relocating to or from areas outside of the continental United States and demonstrate the need for additional funds. In such cases, the Director of the VMSU may authorize reimbursement for actual costs
- VISTA candidates who are best suited for their placement and demonstrate an undue financial hardship that prevents them from arranging and paying for their ticketed travel from HOR to service site. In such cases, the Director of the VMSU may authorize the purchase of travel on the candidate's behalf. Travel dates, modes of travel, and routing are subject to the discretion of the Director of the VMSU. The candidate forfeits the relocation travel allowance for relocation travel

Other Relocation-Related Expenses

SETTLING-IN ALLOWANCE

VISTAs or Leaders relocating from their HOR to the community where they will serve are eligible for a one-time Settling-In Allowance of \$550. This payment is only for those individuals relocating at the beginning of their service; it is not awarded again when they return home. These funds are meant to defray costs for initial expenses, such as deposits or fees associated with starting new utility services, security deposits on an apartment, etc.

No receipts are required. These funds are taxed as income and are included with the VISTA's first living allowance payment. The CSO enters the approved amount for the Settling-In Allowance on the placement screen in the My AmeriCorps portal.

Please see the last section of this chapter "Appealing to the VMSU" for how to request an adjustment to the settling-in allowance and relocation travel allowance on behalf of a VISTA.

COLD WEATHER GEAR ALLOWANCE

For an AmeriCorps VISTA member to perform the project assignment effectively, cold weather gear may be essential. Cold weather gear includes clothing and engine block heaters. The VISTA program assists nationally recruited VISTA members relocating to serve in northern Alaska (Fairbanks and vicinity) in purchasing cold weather gear should they need such financial support. For more information, see VDR Chapter 23B – Supporting Members: Benefits.

Other Travel

IN-SERVICE TRAINING TRAVEL

The VISTA program does not pay for travel to In-Service Training events. The sponsor pays for such travel and reimburses VISTAs for travel expenses to and from an In-Service Training.

IN-SERVICE RELOCATION

VISTA members who travel 50 miles or more in order to change project sites during service, (e.g. during a transfer or a site change) are entitled to a new \$550 settling-in-allowance and a relocation mileage allowance as described above.

EMERGENCY TRAVEL

The VMSU processes requests for emergency travel. For the policy and procedure related to emergency travel, see VDR Chapter 23E: Supporting Members - Emergencies.

CLOSE-OF-SERVICE TRAVEL

VISTA members receive a travel allowance for travel from the service site to home of record (HOR) at the close of service. The travel allowance is based on the distance from the service site to the approved HOR at a rate established by the VISTA program. The VISTA program does not purchase or arrange for travel at the end of a VISTA member's service.

The HOR approved at the start of service may not be changed without the written authorization of the Director of VISTA Member Support Unit. The HOR may not be altered after the tenth month of service. If CSO staff feel a VISTA has compelling reasons to change the HOR, the CSO should email the change request to the VMSU before the tenth month of service for the VISTA in question. The email should justify the need for change and include a details provided by the sponsoring organization and/or VISTA.

TRAVEL FOR REENROLLING AND RE-INSTATING MEMBERS

VISTA Members who re-enroll without a break in service and relocate 50 miles or more to a new site (either with the same project or a new project) receive both a travel allowance from project site to project site and the \$550 settling in allowance. The VMSU automatically creates TRPs for the member.

VISTAs are permitted reasonable time to travel safely and directly from project site to project site. Travel time shall not exceed five business days after re-enrollment, transfer or site change. Further, sponsors will permit VISTA members reasonable time to establish residency upon arriving at the project site. The VISTA program expects the sponsoring organization to assist the member in locating and settling into his or her new residence.

VISTA members who re-instate service and relocate 50 miles or more to a new site are also eligible to receive a travel allowance and the \$550 settling in allowance. The amount of the travel allowance depends on the length of the member's break in service between terms.

A VISTA who chooses to serve an additional year of service and has a break in service of less than 60 days is not entitled to reimbursement for Close of Service travel between service terms. VISTAs who serve an additional year and must relocate to a different service site are entitled to reimbursement for travel from the current site to the new service site. These VISTAs will still be eligible to receive their Close of Service travel allowances upon exiting service.

A VISTA who chooses to serve an additional year of service and has a break in service of more than 60 days is entitled to reimbursement for travel back to HOR in between service terms.

Travel Reimbursement Process

For candidates that attend an in-person PSO, to claim reimbursement for travel costs related to relocation and PSO, candidates must complete, sign, and submit the Actual Travel Reimbursement Voucher upon arrival at PSO. Original receipts for eligible PSO travel expenses, such as parking, must be submitted at PSO. Receipts are not required for relocation.

Prior to signing a voucher, the candidate should ensure that all relocation and travel costs have been included. After PSO, no additional expenses may be added to the voucher, except in cases beyond the control of the traveler for which unavoidable and unforeseen expenses were incurred (for example, a cancelled flight that leads to an overnight stay).

CNCS representatives (VMSU or Training Unit staff) verify the information, finalize the voucher, and send the voucher to the FFMC for processing.

Members who attend an online PSO, or relocate due to a transfer, site change, re-enrollment or reinstatement claim reimbursement for travel costs by completing the Actual Travel Reimbursement Voucher and returning the voucher to the VMSU by mail within 30 days of their relocation date.

To claim reimbursement for travel costs at the end of service, a VISTA completes the Actual Travel Reimbursement Voucher and returns the voucher to the VMSU within 30 days of the official end-of-service date.

The VMSU sends all Actual Travel Reimbursement Vouchers to the FFMC for processing. Reimbursement is made via direct deposit to the traveler's bank account. If a traveler does not establish direct deposit, or if there is a problem in issuing the reimbursement via direct deposit, a check will be mailed to the project site (in the case of a currently serving VISTA), permanent address (in the case of a VISTA who has completed service), or home address (in the case of a supervisor). Reimbursement payments are usually made within eight weeks of submission of the voucher.

SERVICE-RELATED TRANSPORTATION

Sponsors are responsible for determining the service-related transportation needs of each VISTA position when developing the VISTA Project Plan and VISTA Assignment Description. VISTAs should use public transportation in connection with their project duties when it is available and adequate. When public transportation is not a viable option, the sponsor must provide transportation or vehicles for the VISTA to use in performing assignments, or identify the need for a VISTA's privately owned vehicle (POV) (see Vehicle Authorization below).

A VISTA may operate a sponsor-owned or sponsor-leased vehicle, as defined in the Memorandum of Agreement under Sponsor's Obligations. In eGrants, the sponsor details the VISTAs' service-related transportation costs, including mileage, in the Project Narrative, Section E (Recruitment and Development of Members, Volunteers and Participants), Number 2 (Describe the service-related transportation needs of the AmeriCorps VISTA members and your plans for meeting those needs). The budget should also outline significant transportation and mileage costs under volunteer expenses.

The sponsor reimburses the VISTA for authorized service-related transportation expenses.

VEHICLE AUTHORIZATION

The Memorandum of Agreement between the CNCS and the sponsor defines the types of approved VISTA service-related transportation and the reimbursement responsibilities of the sponsor. A V-81 form (AmeriCorps VISTA Use of Vehicles and Public Transportation), must be on file when any of the following measures are used for service-related transportation:

- Vehicle owned or leased by the sponsoring organization
- Vehicle owned or leased by a member
- Public transportation
- Vehicle owned or leased by another person and approved for member use by the CNCS State Director

The VISTA candidate or member completes the V-81 form in My AmeriCorps. The supervisor and the CNCS State Office must approve it. The process for approval is automated.

Sponsors should not make reimbursements for unauthorized service-related transportation expenses. Reimbursement for service-related transportation is made only if a Form V-81 (Use of Vehicles or Public Transportation) is on file for each planned mode of travel.

When a sponsor has a grant approved to reimburse VISTAs for all, or a portion of, service-related transportation, the sponsor reimburses the VISTAs directly with CNCS funding awarded to that sponsor. Once CNCS funding for service-related transportation has been depleted, the sponsor is responsible to reimburse VISTAs with project based funding. (See VDR Chapter 12: Grants).

VISTAs are responsible for the cost of their daily commute to and from the project site.

PRIVATELY OWNED VEHICLE

The sponsor reimburses VISTAs who use a privately owned vehicle for approved service-related transportation expenses, excluding the daily commute to the project site, at the rate applied to all service-related transportation by the sponsoring organization. If the sponsoring organization does not have a standard rate, then the federal mileage rate is applied. These reimbursement rates are intended to cover gas, oil, wear and tear, and routine maintenance expenses.

PUBLIC TRANSPORTATION

The sponsor pays for service-related public transportation expenses. CNCS may authorize a public transportation allowance that is paid directly and monthly to the VISTA or to the sponsor through a grant. The sponsor must submit Form V-81 to the CSO for authorization for each mode of transportation planned for service-related travel (see Vehicle Authorization above). See chapter 12 for more information regarding allowable grant costs.

LICENSING AND INSURANCE

The sponsor and the VISTA are responsible for compliance with all state and local laws concerning vehicle registration, operator licensing, and insurance on any vehicles used by the VISTA.

The Federal Tort Claims Act covers VISTAs for third party liability (i.e., damage or injury to others) while in the performance of official duties. The Federal Tort Claims Act does not cover damage to the VISTA's own vehicle, nor is the VISTA program responsible for any damages to the VISTA's vehicle.

The VISTA may not transport passengers, other than those authorized by the supervisor as directly related to, and within the scope of, a VISTA's official responsibilities. The Federal Tort Claims Act does not cover unauthorized passengers for personal injury. The VISTA may be held individually liable for injuries to passengers and subject to administrative action.

Appealing to the VMSU

Both the relocation travel allowance and the \$550 settling-in-allowance are awarded to VISTA candidates and members who move 50 miles or more from their home of record. If a VISTA candidate or member does not meet this requirement, but the CSO believes there to be a compelling reason that an individual member's case should receive special attention, the CSO can email VMSU_Staff@cns.gov to submit an appeal to the VMSU Director. The request must detail how a member meets one of the following criteria:

- Candidate is moving slightly less than 50 miles (i.e. 48 miles)
- Candidate demonstrates a significant financial hardship – currently living in poverty (not simply a recent college grad with access to resources)

- Summer Associate who decides to stay on for a full year of service at the same service site. We would not issue relocation travel allowance (because s/he relocated for a SA term and SAs are not eligible for relocation), but now the member needs to set up permanent housing (vs. summer temporary housing) or to ship items from their HOR to site

Upon receiving an appeal from the CSO, the Director of the VMSU can approve the member for a pro-rated settling-in-allowance up to the standard \$550. Candidates and CSOs cannot appeal to receive a travel allowance based on mileage for distances less than 50 miles. The Director of the VMSU has final authority in granting VISTA member's settling-in-allowances.

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Chapter 23E:

Supporting Members—Emergencies

Chapter Owners: VISTA Member Support Unit

Effective Date: October 15, 2016

Reviewed: September, 2016

Overview of Emergencies

While in service, a VISTA or a Leader may have an emergency arise. In some instances, the VISTA program can help with the emergency. Those instances are described in this chapter.

Natural Disasters

EVACUATION OF A VISTA

When an emergency situation arises that poses a potential or actual threat to life or property, a VISTA is expected to abide by the following instructions:

- Follow the orders or recommendations of the state or local authorities regarding the need to evacuate an area
- Seek shelter and contact the CSO and project supervisor to notify them of the VISTA's location
- If the CSO cannot be reached, contact the National Service Hotline: 1-800-942-2677

If the VISTA cannot return to the project site after five business days, the CSO places the VISTA on administrative hold for up to 30 days; the VISTA continues to receive a living allowance. The VISTA may seek an assignment at another project in another area through the CSO/CNCS. If after 30 days, the project site remains closed and the VISTA has not identified another assignment, the CSO terminates the VISTA for a compelling reason. (See Chapter 26.)

If the VISTA needs to travel from the disaster area to the VISTA's home of record or another safe location, the CSO follows normal travel procedures when possible. As described below in the section on Emergency Travel, the sponsor may provide an advance payment for emergency expenses.

Emergency Travel

When circumstances require a VISTA to take emergency leave (see next paragraph) that requires travel, the VISTA program pays for the fastest, regularly scheduled means of transportation to and from project

site to the emergency, or to the home of record, within the United States or a U.S. Territory. Checked baggage is not authorized for emergency travel.

The sponsor may allow up to five workdays of emergency leave under two circumstances: (1) if an immediate family member (spouse, domestic partner, parent, sibling, child, grandparent, or guardian) becomes critically ill or dies; and (2) if a natural disaster requires that the VISTA leave the site. Emergency leave does not count against a VISTA's personal leave time. If more than the five workdays leave is needed, the VISTA may use personal and/or medical leave which will count against leave balances. If all leave has been exhausted, the VISTA will be terminated early for compelling reasons.

If circumstances require a VISTA to take emergency leave, the VISTA must notify the sponsor/supervisor at once, and if requested, provide the sponsor/supervisor with evidence of the emergency. The sponsor must inform the CSO immediately, if they determine an emergency exists.

If emergency travel is needed, the steps are:

- CSO completes the Emergency Travel Request posted in the VISTA Member Support Unit section for the Office of AmeriCorps VISTA Intranet site
- CSO attains SPD approval
- CSO submits the Emergency Request Form and SPD approval email to the VMSU at VMSU_Staff@cns.gov
- VMSU staff contacts the VISTA and helps arrange the travel
- VMSU staff completes a VISTA Payment Voucher and sends it to the VISTA for signature
- VISTA signs the voucher and returns it to the VMSU for processing

In the rare event that CNCS cannot provide a prepaid ticket in advance of the approved emergency travel, the sponsoring organization furnishes the needed travel assistance. This assistance includes advancing up to \$500 from the sponsor's own funds to the VISTA, as provided for in the memorandum of agreement between the sponsor and CNCS. Both the sponsor and the VISTA must complete and sign the VISTA payment voucher form to record receipt of an emergency travel advance. The sponsor forwards the form to the VMSU for processing. The funds will be reimbursed to the VISTA member, who will reimburse the sponsor.

Total Disability and Terminal Illness

VISTAs and Leaders (not Summer Associates) may purchase life insurance under a group policy with the Reliance Standard Insurance Company. Enrollment is voluntary and takes place in the My AmeriCorps portal. The life insurance may provide payments when a VISTA becomes totally disabled during service due to any of the following conditions:

- Life threatening cancer
- Heart attack

- Kidney failure
- Receipt of a major organ transplant
- Stroke

The life insurance may provide payments when a VISTA becomes terminally ill (illness or physical condition that is certified by a physician to likely result in death within 12 months).

If an insured VISTA becomes totally disabled or terminally ill, the CSO sends the following information regarding the VISTA to the VMSU (see Chapter 31: When You Need to Talk to a Person for current contact information):

- Name
- Age
- Whether totally disabled or terminally ill
- Project name
- Sponsor name
- Date the VISTA entered on duty

Death in Service

When a VISTA dies during service, the parties below take the following actions.

CSO:

- Sends an email to the VMSU (vmsu_staff@cns.gov), copying the VISTA Director, the VISTA Deputy Director, and the FFMC Director that lists the deceased VISTA's:
 - Name
 - Age
 - Cause of death
 - Project name
 - Sponsor name
 - Date the VISTA entered on duty
 - Survivor name, address, and relationship
- Coordinates with the next of kin, the transportation of the body and shipment of personal effects, as necessary
- Contacts the VISTA Headquarters Health Benefit Administrator (see Chapter 31: When You Need to Talk to a Person for current contact information) to cover medical costs related to the death (e.g. ambulance, hospital costs)
 - In certain circumstances, IMG may be able to coordinate and cover the costs of transportation of the body.

- Contacts the VISTA Headquarters Workers' Compensation Administrator (see Chapter 31: When You Need to Talk to a Person for current contact information) if the death is service-related
- Ships personal effects, as necessary; documents shipping expenses with receipts

VMSU:

- Changes the service end date
- Changes the end-of-service benefit to a stipend, if the deceased VISTA had elected the Education Award
- Changes the member's status to early termination and selects "Death" in the drop-down menu
- Arranges with the FFMC for any payments to cover costs related to the death, such as transportation of the body and shipment of personal effects
- Authorizes AmeriCorps VISTA Payroll to send any unpaid subsistence allowance and stipend payment to the beneficiary listed on the Designation of Beneficiary Form in the member's My AmeriCorps record.

VISTA HQ:

- Prepares a condolence letter from the Director of VISTA
- Processes Life Insurance payments, as necessary

If the VISTA is enrolled in the Life Insurance group policy, the VISTA HQ Life Insurance Manager:

- Sends [Form EF-1036 \(https://customercare.rsli.com/Forms/Default.aspx\)](https://customercare.rsli.com/Forms/Default.aspx) to the beneficiary for completion and requests an original death certificate.
- Reviews the paperwork returned from beneficiary for completeness and forwards it to Reliance Standard Insurance Company for payment

Driving Accidents

If a VISTA is involved in an accident and is at fault while driving a privately owned vehicle and undertaking VISTAs duties, the VISTA's liability for injuries or property damage sustained by third parties is covered under the Federal Tort Claims Act. CNCS or the VISTA program is not responsible for any damage to the VISTA's own vehicle.

The VISTA should immediately notify local law enforcement and comply with local requirements. Within two days of the accident, the following actions must be taken:

- Completion of [Form SF-91 \(http://www.gsa.gov/portal/forms/download/116406\)](http://www.gsa.gov/portal/forms/download/116406), Operator's Report of Motor Vehicle Accident
 - The VISTA completes sections I-IX
 - The Supervisor completes section X of form

- The Accident Investigator completes sections XI-XIII only if bodily injury or fatality occurs, and/or damage exceed \$500
- The VISTA obtains the names and addresses of witnesses and a statement from each witness. When there are no witnesses and, therefore, a Form SF-94 cannot be prepared, a statement to this effect is included in the operator's report (Form SF-91), and certified by the supervisor
- The VISTA obtains an official police report in all instances in which the state law requires an official police report
- The VISTA attaches an official police report to Form SF-91 for all accidents involving property damage, no matter how minor
- The VISTA submits the original and one copy of all reports to the CSO
- In the case of an injury resulting from an auto accident, the VISTA should provide a copy of the accident report made to police or other authorities and a completed [CA-1 form](http://www.dol.gov/owcp/regs/compliance/ca-1.pdf) (<http://www.dol.gov/owcp/regs/compliance/ca-1.pdf>) when submitting the claim for Worker's Compensation. (See Chapter 23B for details related to Worker's Compensation.)

The CSO forwards the original reports to the Office of General Counsel and the VMSU. Both the VISTA and the sponsoring organization should retain copies of all forms submitted for their records.

The VISTA and the sponsor are prohibited from making any representation concerning the ultimate liability of the federal government on a particular claim to other parties to an accident. CNCS's Office of General Counsel (OGC) and, where applicable, the Department of Justice, makes the final determination on whether an accident occurred within the scope of the VISTA's project-related activities and the extent of the government's liability.

The CSO immediately advises OGC if civil action is brought against either the VISTA or the sponsor as a result of the accident, or if the VISTA is asked or ordered to testify or to be deposed.

The CSO sends copies of all legal documents, via UPS, to the Corporation for National & Community Service; Office of General Counsel; 250 E St, SW; Washington, DC 20525. Neither CNCS nor the VISTA program is responsible for any indemnification or contribution to the sponsor for any damages sustained by the sponsoring organization.

Emergency Expense

The VMSU Director may authorize, at his/her discretion, a one-time payment of up to \$500 to a VISTA, Leader, or candidate to cover extraordinary emergency costs if:

- Reimbursement is essential to the VISTA's capacity to serve effectively for the duration of the term of service
- The loss, damage, or theft did not result from the VISTA's own negligence

- The items lost due to theft or fire were uninsured (stolen items or insured items covered by renter's insurance cannot be claimed)

VISTAs, Leaders, and candidates are responsible for safeguarding their personal property. Neither CNCS nor the VISTA program is an insurer of personal property or cash and does not replace or reimburse for the loss of personal property or cash.

If the VISTA suffers a loss, the VISTA must provide to the CSO a written statement, signed, and dated. The statement must include the following:

- Description of the circumstances surrounding the loss
- Itemization of the property lost
- Explanation of why the property is essential to the VISTA's ability to serve effectively
- Police report where appropriate
- Indication of whether the property was covered by insurance (if covered by insurance, provide name of insurance company and policy number) and if a claim has been presented. Items covered by insurance are not eligible for emergency expenses
- Description of the need for the expense obtained from the VISTA
- Cost of the item(s) obtained from the VISTA

The CSO sends an [Emergency Funds Request Form](#) (<http://portal.cns.gov/Portals/0/Emergency%20Funds%20Request%20Form.pdf>) along with the above information and SPD approval to the VISTA Member Support Unit at VMSU_staff@cns.gov. The emergency allowance, not to exceed \$500, is paid to the VISTA via a voucher. The VISTA receives the emergency payment through direct deposit.

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Chapter 23F: Supporting Members – Standards of Conduct

Chapter Owners: VISTA Management

Effective Date: October 15, 2016

Reviewed: September, 2016

Overview of Standards of Conduct ³⁸

VISTAs, Leaders, and Summer Associates are expected to conduct themselves in a manner that reflects positively on themselves, the VISTA program, and the federal government. A violation of the standards of conduct may be grounds for termination for cause.

Service Term Limit ³⁹

Under no circumstances may an individual be enrolled to serve as a VISTA beyond five years. The appropriate Area Manager, not the VISTA Director, will approve members who wish to serve four or five terms.

Political Activities ^{40,41}

AmeriCorps VISTA members, as well as AmeriCorps VISTA projects, are subject to certain restrictions related to their engagement in political activities. Such political activities are classified as either: (1) engaging in electoral activities; (2) working on or influencing pending legislation (e.g., lobbying); or (3) participating in demonstrations.

A VISTA may not engage in political activity while on duty as a VISTA or when identifiable as a VISTA. A VISTA can be “identifiable as a VISTA in a variety of contexts”. As a guide, below is a list of ways a VISTA may be “identifiable as a VISTA”. Please do not consider the list as a definitive list.⁴²

- Wearing VISTA clothing or logos
- Working in a venue where a member will be recognized as a VISTA
- Using the vehicle of the VISTA project

³⁸ [45 CFR §2556.700 \(2016\).](#)

³⁹ [45 CFR §2556.305\(e\) \(2016\).](#)

⁴⁰ [45 CFR §2556 Subpart H \(2016\).](#)

⁴¹ [45 CFR §2556.705 \(2016\).](#)

⁴² [45 CFR §2556.710 \(2016\).](#)

- Identifying oneself as a VISTA in speech or writing
- Participation in or submissions to social media sites funded or administered by CNCS (e.g., VISTA Campus, Facebook, Twitter, YouTube)
- Identifying as serving in AmeriCorps VISTA and participating in or submitting to public social media sites (e.g., Facebook, Twitter, YouTube)

ENGAGING IN ELECTORAL ACTIVITIES

The Hatch Act is a law that addresses the rights of state and federal employees and VISTAs to engage in certain political activities, while prohibiting participation in other political activities. For the purposes of the Hatch Act, VISTA Members are considered federal employees.⁴³

A VISTA **may** (while off-duty and not identifiable as a VISTA):⁴⁴

- Register and vote as s/he chooses
- Attend and be active at political rallies and meetings
- Express opinions about candidates and issues
- Contribute money to political organizations
- Assist in voter registration drives
- Sign nominating petitions
- Distribute campaign literature in partisan elections
- Campaign for or against referendum questions, constitutional amendments, municipal ordinances
- Campaign for or against candidates in partisan elections
- Drive voters to the polls (no project vehicle)
- Attend political fundraising functions
- Join and be an active member of a political party or club
- Make campaign speeches for candidates in partisan elections
- Hold office in political clubs or parties
- Be a candidates for public office in nonpartisan elections
- See section below: Influencing Legislation Exceptions (Lobbying), for additional information

A VISTA may not:

- Engage in political activity while on duty as a VISTA at a project, wearing a VISTA logo, or using a vehicle of the VISTA project or when otherwise identifiable as VISTA
- Wear partisan political buttons while on duty as a VISTA
- Use official authority or influence to interfere with an election

⁴³ [45 CFR §2556.300 \(2016\).](#)

⁴⁴ [45 CFR §2556.715 \(2016\).](#)

- Solicit or discourage political activity of anyone with business before the VISTA sponsor or project where they serve
- Solicit or receive political contributions while in their VISTA service term
- Be candidates for public office in partisan elections⁴⁵
- See section below: Influencing Legislation Exceptions (Lobbying), for additional information

The Office of Special Counsel, an independent agency of the federal government, enforces the Hatch Act for state and federal employees and VISTAs. The Office of Special Counsel determines penalties for Hatch Act violations. Any VISTA who violates the Hatch Act may be subject to severe disciplinary action of at least 30 days' unpaid suspension and may be terminated for cause from the VISTA program. Visit <http://www.osc.gov/hatchact.htm> for additional information.

INFLUENCING LEGISLATION EXCEPTIONS (LOBBYING)⁴⁶

A VISTA may (while off-duty and not identifiable as a VISTA) engage in lobbying activities related to influencing the passage or defeat of legislation, or of legislative proposals or initiatives.

No VISTA sponsor or project may assign a VISTA, Leader, or Summer Associate to perform service or engage in activities related to influencing the passage or defeat of legislation or petitions.

The Domestic Volunteer Service Act of 1973, as amended, allows for two exceptions to the prohibition on efforts to influence legislation:

- A sponsor or project staff, a VISTA, a Leader, or a Summer Associate may—only when requested by a legislative committee or by legislators—draft, review, testify, or make representations to the legislative committee or legislators
- A sponsor or project staff, a VISTA, a Leader, or a Summer Associate may undertake an activity in connection with an authorization or appropriation directly affecting the VISTA operations of the sponsor or project

DEMONSTRATIONS⁴⁷

While on authorized leave or not engaged in VISTA service, a VISTA is permitted, as long as s/he is not identified as a VISTA, to participate in lawful demonstrations, whether live or virtual, that are not project related. A VISTA's participation cannot be interpreted by the community as identified with the VISTA program, the project, or other elements of the VISTA's service and cannot interfere with the performance the VISTA's duties.

⁴⁵ [45 CFR §2556.735 \(2016\).](#)

⁴⁶ [45 CFR §2556.725 \(2016\).](#)

⁴⁷ [45 CFR §2556.755 \(2016\).](#)

The sponsoring organization must not involve a VISTA in the planning, initiating, participating in, or otherwise aiding or assisting in any demonstration or other political meeting.

Religious Activities ⁴⁸

In accordance with the First Amendment of the Constitution, VISTAs, Leaders, and Summer Associates are not allowed to participate in religious activities in conjunction with their VISTA service.

The sponsor shall ensure that the VISTA will not give religious instruction, conduct worship services, engage in any form of proselytizing, or participate in any other religious activity as an official part of the VISTA service. The sponsor agrees to these restrictions when signing the memorandum of agreement (paragraph 8d). A sponsor who violates these restrictions is in noncompliance with the memorandum of agreement. If the CSO believe that the sponsor is in violation, the CSO should first issue a finding in writing to the sponsor, allowing the sponsor to refute the finding or promise that the unallowable activity will cease. If the sponsor continues the unallowable activity, the CSO should consult with Headquarters on project termination proceedings.

The First Amendment allows VISTAs to serve with religious organizations, as long as the activities of the VISTAs are of a nonreligious nature. For example, a VISTA serving with a religious organization may assist in setting up a mentoring project for ex-offenders since the mentoring project is not a religious activity.

Sexual Harassment

Federal legislation prohibits sexual harassment. Sponsors, in the memorandum of agreement (paragraph 5), assume responsibility for violations of prohibitions against sexual harassment and for the corrective action and/or disciplinary action if violations occur.

The memorandum of agreement lists three behaviors that violate the sexual harassment prohibitions. The Supervisors' Orientation and Pre-Service Orientation provide instruction on the behavior that constitutes sexual harassment.

Sexual harassment is unwelcome behavior. Sexual harassment is not limited to prohibited conduct by a male toward a female or by a supervisor toward a subordinate. The victim does not have to be the actual target of the unwelcome sexual conduct, but may be affected by such conduct although directed at another person.

REPORTING SEXUAL HARASSMENT

If a VISTA believes he or she may be the victim of sexual harassment, the VISTA should immediately bring the information to the attention of his or her sponsor. If it is not appropriate or possible to alert

⁴⁸ [45 CFR §2556.175 \(2016\)](#).

the sponsor, the VISTA should contact the CSO, or the CNCS Office of Civil Rights and Inclusiveness at 202-606-7503 or eo@cns.gov.

Gifts

Sponsors are prohibited from supplementing the living allowance of their VISTAs (as acknowledged in ## of the Memorandum of Agreement). A VISTA is prohibited from requesting or receiving compensation or benefits from the sponsor or the community the VISTA serves, unless permitted by VISTA policy. A VISTA is allowed to accept, according to VISTA policy, housing, transportation, bus passes, training materials, and tools. For additional information, please reference VDR Chapter 23B, Appendix 23B-1: List of Approved Financial and In-Kind Support.

Compensation for Service

A VISTA is prohibited from receiving any monetary compensation for service other than the allowances the VISTA is paid by CNCS during his or her term of service.

Additional Employment

While serving as a VISTA, a member may also work part time provided it is approved by the sponsor and complies with VISTA's [Outside Employment Policy](https://www.vistacampus.gov/resources/outside-employment-policy) (<https://www.vistacampus.gov/resources/outside-employment-policy>). Any outside employment must not conflict with the VISTA member's training, service, or service hours as assigned by CNCS or the sponsor. To the maximum extent practicable, VISTA members must remain available for service without regard to regular working hours. The VISTA project's needs supersede any requirements of outside employment.

If a VISTA pursues outside employment while in VISTA service, the VISTA is not, under any circumstances, permitted to be an employee of or contractor for the sponsor, sub-recipient, or other project-related organization to which the VISTA is assigned to serve. While in VISTA service, the VISTA may only accept outside employment for positions that are:

- Legal
- Part-time
- Do not conflict at all with the VISTA's service or service hours
- Do not violate any applicable Federal, state, and/or local laws and regulations
- Do not conflict with any AmeriCorps VISTA program requirements or policies

Before accepting such outside employment, the VISTA must speak with and obtain the [written approval of their supervisor](#) (https://www.vistacampus.gov/sites/default/files/Outside_Employment_Request_Form.pdf) to do so.

To approve outside employment, their supervisor must ensure there is no conflict between the employment and the VISTA's service or service hours.

Teleservice

Under limited circumstances, the CNCS State Office may approve VISTA members to perform service at a project under a teleservice agreement where they can perform project-related duties from home. VISTA members may request to perform project-related tasks from home. Members who request to serve under a teleservice arrangement under the auspices of a reasonable accommodation request are excluded from this policy, as those requests are covered under other laws and policies.

Requests for episodic teleservice, not to exceed two days per pay period (a pay period is 14 continuous days), may be considered after a member has been serving satisfactorily at the project site at least three months. Both the supervisor and the CNCS State Office must agree that the following VISTA service requisites are fully satisfied:

1. The member knows the organization and the people within it well enough to effectively build capacity within the organization
2. The member lives and serves the people in the community, and knows the community and people sufficiently to serve them well;
3. The member has proven to the sponsor/supervisor to be a reliable team member (punctual, motivated, professional, thorough, etc.)
4. The member understands that VISTA service is not a 9-5 assignment; that it demands flexibility and availability in one's schedule
5. The supervisor acts as coach and mentor and goes beyond the responsibilities of a supervisor to an employee

In addition to the prerequisites above, the member's VISTA Assignment Description (VAD) must lend itself to teleservice in that the tasks can be completed from home. Under no circumstances can teleservice be approved as a regular part of a member's assignment schedule.

To apply for an episodic teleservice arrangement, a member must (1) request a [Teleservice Checklist form](https://www.vistacampus.gov/sites/default/files/legacy/90/Policy/TeleServiceChecklist.pdf) (<https://www.vistacampus.gov/sites/default/files/legacy/90/Policy/TeleServiceChecklist.pdf>) from the State Office; (2) complete the Teleservice Checklist Form and obtain the VISTA supervisor's approval and signature; and (3) submit the Teleservice Checklist Form to the State Office. The State Office must also approve the requested teleservice. A member cannot engage in teleservice unless the member gets the written approval of both the VISTA supervisor and the CNCS State Office. If the CSO approves teleservice, the Teleservice Checklist must be maintained in the VISTA member's service file and in the project file at the CNCS State Office. At the discretion of the CNCS State Office, a teleservice arrangement for a member can be revoked at any time, without prior notice.

Educational Courses

Full-time or part-time enrollment in an educational institution is allowed, provided the coursework does not interfere with the VISTA's responsibilities. VISTAs must discuss plans for enrolling in educational courses with their site supervisor. For full details regarding VISTAs taking educational courses during their service year, see the [VISTA Policy allowing Members to Take Educational Classes while Serving \(<http://portal.cns.gov/Portals/0/2012%20Policies/VISTAs%20taking%20Ed%20Classes.pdf>\)](http://portal.cns.gov/Portals/0/2012%20Policies/VISTAs%20taking%20Ed%20Classes.pdf).

When considering whether or not to permit a VISTA to enroll in educational courses, VISTA sponsors must consider the competing commitments of coursework and VISTA service. Sponsors should clearly advise applicants of the uniquely rigorous commitments regarding VISTA service in contrast to traditional employment.

Service to the organization and community takes precedence over coursework. If a VISTA member is unable to complete assigned tasks or responsibilities due to coursework, the supervisor shall contact the CNCS State Office. If schedules and demands of the sponsoring organization and the course cannot be balanced, the CSO shall direct the VISTA member or Leader to withdraw from the course. Failure to withdraw is cause for termination from the VISTA program and forfeiture of all benefits.

FINANCIAL OBLIGATIONS

VISTAs may participate in scholarship and financial aid programs, provided the program requirements do not interfere with the operations of the VISTA project to which they are assigned or the responsibilities of the VISTA. The VISTA project's needs supersede any requirements.

Nepotism

To avoid actual or apparent favoritism in the operation of a VISTA project, VISTA prohibits certain VISTA placement and assignment arrangements, as follows:

A VISTA member cannot be placed or assigned to a VISTA project site⁴⁹ if the VISTA is:

- In the immediate family (e.g., spouse, domestic partner, parent or guardian whether by blood or adoption, child whether by blood or adoption) of a project site staff member
- A close relative, whether by blood or adoption, (e.g., grandparent, grandchild, aunt, uncle, niece, nephew, first cousin) of a project site staff member
- In the immediate family (e.g., spouse, domestic partner, parent or guardian whether by blood or adoption, child whether by blood or adoption) of a member of the VISTA project site's board of directors

⁴⁹ A VISTA sponsoring organization may operate a VISTA project out of a single project site, or multiple sites. When a "project site" is referenced, the prohibited arrangement is limited to that particular site, rather than the project as a whole.

- A close relative, whether by blood or adoption, (e.g., grandparent, grandchild, aunt, uncle, niece, nephew, first cousin) of a member of the VISTA project site's board of directors

A project site employee is prohibited from holding a VISTA project supervisory position if the VISTA is:

- In the immediate family (e.g., spouse, domestic partner, parent or guardian whether by blood or adoption, child whether by blood or adoption) of any CNCS program official responsible for the AmeriCorps VISTA project
- A close relative, whether by blood or adoption, (e.g., grandparent, grandchild, aunt, uncle, niece, nephew, first cousin) of any CNCS program official responsible for the AmeriCorps VISTA project
- In the immediate family (e.g., spouse, domestic partner, parent or guardian whether by blood or adoption, child whether by blood or adoption) of any project site employee who holds supervisory authority over the VISTA
- A close relative, whether by blood or adoption, (e.g., grandparent, grandchild, aunt, uncle, niece, nephew, first cousin) of any project site employee who holds supervisory authority over the VISTA

Copyright

The VISTA program is a federal resource supported by the public. The nature of national service is such that products of service are for the benefit of the community. Copyrighting materials developed through the VISTA program could restrict the distribution of the materials and be inconsistent with the mission and goals of the VISTA program.

By enrolling, a VISTA agrees to give CNCS and the sponsor an unlimited, royalty-free, non-exclusive, and irrevocable license to use, reproduce, and publish products created. Sponsors are encouraged to see that the VISTA receives appropriate recognition for their creative work.

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Chapter 24:

Health and Child Care Benefits

Chapter Owners: Program Impact and Operations, and VISTA Management

Effective Date: October 15, 2016

Reviewed: September, 2016

Health Care Benefits

The Affordable Care Act and VISTA

The **Affordable Care Act (ACA)** has reformed healthcare in the United States, and continues to ensure that qualifying essential health benefits are made available to all Americans through state and federal Health Insurance Marketplaces. Additionally, the law:

- **requires** all Americans, who can afford it, to purchase qualifying health coverage which meets Minimum Essential Coverage (MEC) requirements or pay a tax penalty;
- **reduces the cost of monthly premiums** for low-income individuals by offering premium tax credits;
- **caps out-of-pocket costs** for individuals who maintain a qualifying health coverage plan. The maximum out-of-pocket amount may change annually - i.e., \$6,850 in 2016.

The ACA also provides an exemption from the requirement to have health coverage for individuals who meet certain criteria, such as limited household income, or membership in a federally recognized tribe.

AmeriCorps VISTA offers healthcare benefits to VISTA members based on whether they have health insurance and whether they are required to by the Affordable Care Act (ACA). For additional detailed information, please review the AmeriCorps VISTA Health Benefits and FAQ on the VISTA Campus:

https://www.vistacampus.gov/in-service/benefits-service#healthcare_benefit.

CSOs should encourage VISTA members to carefully review all the healthcare benefit resources available on the VISTA Campus: https://www.vistacampus.gov/in-service/benefits-service#healthcare_benefit.

FOR MEMBERS WHO HAVE HEALTH INSURANCE

VISTA members who maintain qualifying health coverage during their service term may enroll in the **AmeriCorps VISTA Healthcare Allowance**. This allowance is a supplemental healthcare allowance program that covers out-of-pocket costs associated with healthcare. Out-of-pocket expenses may include: annual deductible, coinsurance, copayments, other qualified medical expenses as outlined by a primary health plan and/or basic dental or vision plans. The Healthcare Allowance will help offset these expenses up to \$6,850 in 2016. The Healthcare Allowance does not cover costs associated with

purchasing insurance, costs for non-essential health expenses, or charges associated with dependents or other individuals covered under a member's healthcare plan.

Examples of qualifying healthcare coverage that would make the AmeriCorps VISTA Healthcare Allowance beneficial:

- Family health insurance coverage: If a member is age 26 or younger and on a parent's plan, or married and covered by a spouse's plan
- Health insurance purchased through the Health Insurance Marketplace
- Medicaid, Medicare, or military healthcare benefits
- Coverage under a separate government-sponsored program or act such as benefits available to individuals in the U.S. territories or who belong to a federally recognized Indian tribe

FOR MEMBERS WHO NEED HEALTH INSURANCE

Special Enrollment Periods for AmeriCorps VISTA Members in the Health Insurance Marketplace:

If a member would like to buy insurance through the Health Insurance Marketplace, they can take advantage of the [special enrollment periods for all AmeriCorps members](https://www.healthcare.gov/coverage-outside-open-enrollment/special-enrollment-period) (<https://www.healthcare.gov/coverage-outside-open-enrollment/special-enrollment-period>). These special enrollment periods consist of: 1) the **first** 60 days of the member's service term; and 2) the 60 days **after** the member's term concludes. During these two periods, members may buy insurance or obtain an Exemption Certificate Number (ECN) through the Health Insurance Marketplace outside of the public open enrollment period. To apply for coverage under the Special Enrollment Period, shop for coverage and learn more about enrolling in the Health Insurance Marketplace please visit <https://www.healthcare.gov> or contact the Marketplace Call Center at 1-800-318-2596.

FOR MEMBERS WHO ARE LEGALLY EXEMPT FROM THE REQUIREMENT TO MAINTAIN HEALTH INSURANCE

VISTA members who are legally exempt by the ACA from needing to maintain qualifying health coverage during their term of VISTA service are eligible to enroll in the **AmeriCorps VISTA Health Benefit Plan**. This limited benefit plan is available to eligible members at no cost and covers eligible expenses for medical office visits, most lab and x-ray services, limited preventive care (e.g., an annual ob-gyn visit for women), dental and vision, medical emergencies, surgical and hospitalization expenses, and certain prescription drug costs. The plan does not cover pre-existing conditions or care for dependents, including their spouses.

The AmeriCorps VISTA Health Benefit Plan is not insurance. It does not meet the Minimum Essential Coverage (MEC) requirements and therefore does not satisfy the "individual responsibility" requirement of the Affordable Care Act (ACA).

VISTA HEALTHCARE ALLOWANCE PLAN

HOW TO ENROLL IN THE VISTA HEALTHCARE ALLOWANCE PLAN

VISTA members are not automatically enrolled in the AmeriCorps VISTA Healthcare Allowance Plan. In order to enroll in the Healthcare Allowance Plan members must:

- maintain qualifying health coverage throughout the duration of your VISTA service term
- submit a completed Member Enrollment Form to IMG **within the first 30 days** of VISTA service and include details of their qualified healthcare coverage on the IMG Enrollment Form

If a member doesn't currently have qualified health coverage, they will need to visit the Health Insurance Marketplace at <https://www.healthcare.gov/> to see what options are available and purchase coverage. It can take several weeks for a Marketplace application to be processed, so in the meantime members must **enroll** in the AmeriCorps VISTA Health Benefit Plan (below) for up to 60 days.

Once IMG receives and processes the Member Enrollment Form, the member will receive a Healthcare Allowance identification card from IMG to use when receiving medical or prescription services.

VISTA members are not automatically enrolled in the AmeriCorps VISTA Healthcare Allowance. In order to enroll in the Healthcare Allowance Plan members must:

- maintain qualifying health coverage throughout the duration of their VISTA service term
- submit a completed Member Enrollment Form to IMG **within the first 30 days** of VISTA service and include details of their qualified healthcare coverage on the IMG Enrollment Form

HOW TO USE THE HEALTHCARE ALLOWANCE

When visiting a medical provider for services, a member **presents his/her primary health insurance card (or dental/vision card) and IMG Healthcare Allowance ID card**, and encourages their medical provider to bill IMG directly for any out-of-pocket expenses after their primary health coverage. This will lessen the likelihood that the member will have to pay these expenses up front.

If a member is billed by their provider for a medical service that is eligible to be paid for through the Healthcare Allowance benefit, they should submit a completed [Healthcare Allowance Medical Reimbursement Form](http://producer.imglobal.com/producerdocuments.ashx?documentid=3005) (<http://producer.imglobal.com/producerdocuments.ashx?documentid=3005>) (IMG/VISTA claim form) along with the Explanation of Benefits (EOB) from their primary qualifying health coverage provider. IMG will process the claim and, upon approval, pay their healthcare provider directly.

If a member has already paid for an eligible medical service, they should submit a completed IMG/VISTA claim form (<http://producer.imglobal.com/producerdocuments.ashx?documentid=3005>) and any receipts documenting payment, as well as the Explanation of Benefits (EOB) from their primary health

coverage provider. IMG will process the reimbursement claim and, upon approval, issue payment directly to the member.

The receipt of an explanation of benefits (EOB) from a healthcare coverage provider can often take several weeks; to expedite the process; a member may call their healthcare coverage provider and request a copy. The AmeriCorps VISTA Healthcare Allowance Plan Member Guide is available by visiting <https://americorpsvista.imglobal.com/AmeriCorps/documents/member-guide/MemberGuide.aspx>.

VISTA HEALTH BENEFIT PLAN

ELIGIBILITY

To be eligible for the AmeriCorps VISTA Health Benefit Plan, VISTA members must demonstrate they are **exempt from the Affordable Care Act's requirement** to maintain qualifying health coverage.

Additionally, all members who enter VISTA service without qualifying health coverage may **enroll temporarily** in the AmeriCorps VISTA Health Benefit Plan for their first 60 days of service while obtaining qualifying coverage or an Exemption Certification Number. Please note: VISTA members who are enrolled in the AmeriCorps VISTA Healthcare Allowance Plan are not eligible for the AmeriCorps VISTA Health Benefit Plan.

HOW TO ENROLL IN THE VISTA HEALTH BENEFIT PLAN

VISTA members are not automatically enrolled in the AmeriCorps VISTA Health Benefit Plan.

ENROLLING IN FULL-YEAR COVERAGE

To enroll in the Health Benefit Plan for the duration of a service term, a member must submit a completed Member Enrollment Form to IMG and include their Exemption Certification Number (ECN)*.

Once their enrollment is processed and approved, they will receive a Health Benefit plan identification card from IMG to be used as proof of healthcare coverage when you need medical or prescription services.

*ECN – The Exemption Certification Number (ECN) is a unique identifier, provided by the Health Insurance Marketplace that demonstrates exemption criteria.

ENROLLING IN TEMPORARY COVERAGE FOR 60 DAYS

To enroll in the Health Benefit Plan for up to the first 60 days of a service term, a member must submit a completed Member Enrollment Form to IMG requesting temporary coverage. Prior to the expiration of that 60 days, the member will be required to submit an updated member enrollment form with either their Exemption Certification Number (to continue being covered by the AmeriCorps VISTA Health

Benefit Plan) or details of their qualifying healthcare coverage (to enroll in the AmeriCorps VISTA Healthcare Allowance Plan).

Once a member's enrollment is processed and approved, they will receive a Temporary Health Benefit Plan identification card from IMG to be used as proof of healthcare coverage when they receive medical or prescription services.

HOW TO USE THE HEALTH BENEFIT PLAN

When visiting an in-network medical provider or pharmacy, a member should **present their Health Benefit ID card**. Presenting their ID card should ensure that the medical provider and pharmacy will bill IMG directly for covered medical and prescription expenses. The AmeriCorps VISTA Health Benefit Plan Member Guide is available by visiting:

<https://americorpsvista.imglobal.com/AmeriCorps/documents/member-guide/MemberGuide.aspx>.

ADMINISTRATION OF THE AMERICORPS HEALTH BENEFIT PROGRAM

International Medical Group (IMG) is the administrator of the AmeriCorps VISTA Health Benefit Program. For details about either benefit plan, please visit:

<https://americorpsvista.imglobal.com/Americorps>.

Members may contact IMG at:

International Medical Group
P.O. Box 88506, Indianapolis, IN 46208
Telephone: 855-851-2974 (toll-free) or 317-833-1711
Fax: 855-851-2971
Email: vistacare@imglobal.com
Website: <https://americorpsvista.imglobal.com>

Soon after members begin VISTA service, they will receive an email from IMG with instructions for creating a "MyIMGVISTA" account and completing the Member Enrollment Form online. Members need to submit the enrollment form as soon as possible (**within the first 30 days of VISTA service**) to ensure enrollment.

HOW TO GET QUALIFYING HEALTHCARE COVERAGE

If a member does not currently have qualifying healthcare coverage (e.g., through a family insurance plan, Medicaid, Medicare, Military Benefits, or other qualifying healthcare coverage), the best place to start is the Health Insurance Marketplace at <https://www.healthcare.gov>. The Health Insurance Marketplace is an online resource for reviewing plan choices, submitting applications, and getting assistance with questions about healthcare options.

IMG, the AmeriCorps VISTA Health Benefit Administrator, also has staff who can assist members with understanding their options.

TERMINATION OF A VISTA FOR MEDICAL REASONS OR DUE TO EXHAUSTION OF HOSPITALIZATION BENEFITS

Under the AmeriCorps Health Benefits Plan, VISTAs are entitled to up to 21 days of hospitalization coverage per calendar year. The days accrue annually irrespective of terms of service, regardless if the member reenrolls without interruption for another term of service in the same calendar year.

For example, if a member uses 15 days of hospitalization coverage during their first term, and reenrolls to begin their second term in August, they member only has 6 more days of allowed hospitalization coverage through the end of the year.

If, in a calendar year, a VISTA will exceed 21 days of hospitalization covered under the health benefit plan, the VISTA should be terminated.

If the VISTA has other health insurance through a family member or Medicaid, Medicare or Military Benefits, any charges incurred beyond 21 days of hospitalization can be sent to the administrator of the other coverage.

Child Care Benefits

AmeriCorps VISTA offers child care benefits to VISTAs who qualify. Summer Associates are not eligible for the child care benefits. The maximum amount of child care assistance a VISTA can receive is up to \$400 per child per month. To qualify for the VISTA child care benefit, the VISTA must meet the following eligibility requirements:

- The VISTA members' household income must not exceed the limit determined by the state in which the child care is provided; this limit is different for each state and may change annually. The total household income is used to determine your income eligibility excluding the VISTA living allowance
- The member must not currently receive a child care subsidy from another source
- The member must be the parent or legal guardian of a child under the age 13
- The child must reside with the member
- The member must certify that he or she needs child care in order to participate in the AmeriCorps VISTA program

GAP Solutions, Inc. currently administers the child care benefits program for AmeriCorps VISTA. Therefore, VISTAs apply directly to GAP Solutions, Inc. for the child care benefit. VISTAs may learn more

details about the application process from the GAP Solutions, Inc. website at:
<https://www.americorpschildcare.com/> or by contacting GAP Solutions, Inc. at:

AmeriCorps Childcare Program
205 Van Buren Street, Ste. 205
Herndon, VA 20170
AmeriCorpsChildCare@gapsi.com
Toll-Free Number: 1-855-886-0687
Fax: 1-800-521-5415

A VISTA who is approved to receive the child care benefit may apply a portion of the subsidy to cover the cost for child care while the VISTA attends Pre-Service Orientation.

CHILD CARE PROVIDERS

Child care providers must meet eligibility requirements as regulated under the Child Care and Development Block Grant Act of 1990 (42 U.S.C. 9858n (5)); regulations vary by state and are subject to change annually. Child care benefits are paid only to childcare providers who have the qualification requirements to participate in the Child Care Subsidy Program. Childcare benefit payments cannot be paid directly to the VISTA members.

Child care providers must also apply in order for their eligibility to be determined. Providers may also visit the GAP Solutions, Inc. website at: <https://www.americorpschildcare.com/> for more information on the application process.

STATE BENEFIT LIMITS

Each state has different benefit limits for child care to eligible households. The VISTA regulations follow the state limits. The maximum child care subsidy provided by CNCS to a VISTA is \$400 per child, but the VISTA subsidy CANNOT exceed the prevailing rate in the state in which the care is provided. The prevailing rate is determined by each state and may change each year. If the state has a rate that is less than the VISTA subsidy, the lower rate prevails.

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Chapter 25:

Segal AmeriCorps Education Award and National Service Trust

Chapter Owners: VISTA Member Support Unit

Effective Date: October 15, 2016

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Overview of Segal AmeriCorps Education Award and National Service Trust

The Segal AmeriCorps Education Award is a post-service benefit for AmeriCorps VISTA, State and National, and NCCC members. The award can be used to pay for educational expenses at eligible institutions of higher education (including many technical schools) and to repay qualified student loans. The award can be split and used for both purposes. VISTAs who earn awards can access them in full or in part, and they can take up to seven years after their terms of service end to use the awards.

The monetary value of the Education Award is tied to the maximum level of the federal Pell Grant during the fiscal year in which an AmeriCorps member's position is approved, which is defined for VISTAs as the fiscal year in which a VISTA takes the oath of office. VISTAs may receive the "aggregate value" (total value) of two full time Education Awards. The Education Award may also be prorated, if the member is unable to complete a term of service for compelling personal reasons. (See chapter 26 for additional guidance.) VISTAs who serve only part of a one-year term are eligible to earn additional awards up to the aggregate value of two full time Education Awards in a lifetime.

Summer Associates receive a prorated Education Award following the successful completion of their service term of at least eight weeks. A Summer Associate's Education Award counts towards the total value of two full time awards that an individual may be eligible to receive during his or her life time.

A full explanation of the laws and rules governing the Education Awards is in the Restrictions and Limitations on Awards section below; Appendix 25A provides examples of how to calculate the number of awards. Additionally, refer to [Amount, Eligibility, and Limitations, of Education Awards](http://www.nationalservice.gov/programs/ameri-corps/alumni/segal-ameri-corps-education-award/amount-eligibility-and-limitations) (<http://www.nationalservice.gov/programs/ameri-corps/alumni/segal-ameri-corps-education-award/amount-eligibility-and-limitations>) for detailed information.

Office of the National Service Trust ⁵⁰

The National Service Trust is an account established in the U.S. Treasury to provide funds for Segal AmeriCorps Education Awards for eligible participants who successfully complete AmeriCorps service. The CNCS makes payments from the Trust to education and financial institutions on behalf of those participants.

The Office of the National Service Trust, frequently referred to as the Trust, is the department within CNCS that manages the functions related to the Segal AmeriCorps Education Award. These functions include:

- Providing information to AmeriCorps members and programs regarding the National Service Trust
- Enrolling AmeriCorps members in the Trust and documenting their service
- Making appropriate payments to schools and loan holders as directed by Education Award recipient
- Helping members request forbearances on the repayment of their qualified student loans and making appropriate payments for interest that accrued while the members were serving
- Managing the investments of the Trust
- Trouble-shooting issues regarding program enrollments, award and interest payment requests, and other Education Award-related matters

Eligibility to Receive an Education Award ⁵¹

By law, to serve in approved AmeriCorps positions and receive an Education Award, individuals must be U.S. Citizens, U.S. Nationals, or Lawful Permanent Residents. Additionally, the AmeriCorps VISTA program permits a second group of individuals to serve in AmeriCorps VISTA and receive cash stipend – those who are legal residents of a state (e.g. refugee status, asylum status, and temporary protected status). These individuals are not eligible to receive an Education Award.

The process for verifying the social security number (SSN) status and citizenship status of U.S. Citizens, U.S. Nationals, and Lawful Permanent Resident Aliens is automated.

All VISTA applicants, including individuals with the citizenship status of legally residing within a state, go through an automated citizenship verification process. However, in the unusual case of an applicant who is a person legally residing in a state -- but who is not a U.S. Citizen, U.S. National, or Lawful Permanent Resident Alien -- the Social Security Administration will not be able to verify the individual's information. CNCS State Offices will receive an automated email regarding the legal residency documentation that is

⁵⁰ <http://portal.cns.gov/CNCSDepartments/DepartmentoftheChiefOperatingOfficer/-OfficeoftheChiefFinancialOfficer/OfficeofAccountingFinancialManagement/-OfficeofNationalServiceTrust.aspx>.

⁵¹ [45 C.F.R. §2556.320 \(g\) \(2016\)](#).

required. The State Office is responsible for contacting the VISTA sponsor regarding next steps. The sponsor will need to verify and maintain the individual's documentation and provide copies of it to the VMSU via National Service Hotline for processing. In such cases, an individual must provide government-issued photo identification and an immigration document demonstrating legal residency in a state. Examples include refugee status, asylum status, and temporary protected status. State Offices must contact the VMSU and alert the unit that the applicant in question is only entitled to receive the end of service cash stipend. The VMSU is responsible for ensuring that the appropriate selection of post-service benefit is made by the member.

Role of VISTA Member Support Unit and CNCS State Offices

The various processes associated with the Segal AmeriCorps Education Award are automated through My AmeriCorps, an online system where VISTAs can manage their accounts, which they create when they enroll in VISTA. They can submit forms, request payments, request loan forbearance, check account balances, review payments, correct contact information, and much more. Information on how to manage an award is provided below in the section, *Members' Access to Information and Awards Payments*.

CNCS State Offices (CSOs) should expect some VISTAs to contact them with questions about the Segal AmeriCorps Education Award process. It is the responsibility of the CSO, with oversight support from the Area Manager, to give general information about the Education Award. General information includes informing applicants or candidates of the maximum value of the full time Education Award for the fiscal year in which they plan to serve. For specific calculations of award amounts in individual cases, the CSO should direct the VISTA to the My AmeriCorps portal. Specific calculations are especially important in circumstances that involve VISTAs who are serving a full term but are only eligible to receive a partial value (thus, a prorated amount) of an Education Award. If staff is unable to answer their questions, staff may direct them to the Vista Member Support Unit or to the help section of My AmeriCorps.

The VMSU provides a full array of support that a VISTA needs to complete a successful year of service. This support includes providing assistance for the application, enrollment forms, training events, active service, end of service, and post-service—including technical assistance regarding the Segal AmeriCorps Education Award process. VISTAs can reach the VMSU via the National Service Hotline at 800-942-2677. CSOs can contact the VMSU by email at vmsu_staff@cns.gov or by calling 512-391-2910.

After VISTAs successfully complete a Pre-Service Orientation, the VMSU also activates their enrollment in the Trust.

VISTA Member Election of Awards

After placement by the CSO, VISTA candidates should complete the online Benefits Election Form through *My AmeriCorps*. This form gives them the choice to select either the Segal AmeriCorps Education Award or the end-of-service stipend. VISTAs cannot choose both.

When candidates select the Education Award as the end-of-service option in the My AmeriCorps portal, the Portal informs the candidates of the value of the Education Award they are eligible to receive upon successful completion of their term of service.

At any time prior to the end of the tenth month of service, VISTAs who initially elect the Segal AmeriCorps Education Award can change their decision and elect the end-of-service stipend instead. If they initially elected the end-of-service stipend, they cannot switch to the Education Award. To change from the Education Award to the end-of-service stipend, they must select the stipend option under “Edit End-of-Service Option” from their member homepage in the My AmeriCorps portal. The selection must be made before the end of the tenth month of service. Members may not make further changes after the tenth month of service.

VISTAs who selected the Education Award and choose to extend their one-year term receive their Education Award upon successful completion of their original year-long term of service. VISTAs are only eligible to receive a pro-rated cash stipend for their term of extension.

VISTAs who choose to re-enroll at the end of their one-year term also receive their Education Award upon successful completion of their original year-long term of service. VISTAs use Part A of the Future Plans Form to indicate their end of service election for the new service term when re-enrolling.

Information on how a VISTA can manage an award is provided below in the section, *Members’ Access to Information and Awards Payments*.

Restrictions and Limitations on Awards

NUMBER OF AWARDS

As noted above, an individual is eligible to receive up to the aggregate value of two Segal AmeriCorps Education Awards. This *aggregate value* should not be confused with the *dollar amount* of an Education Award. Amounts of awards can change from year to year; the value of an award earned does not change. The value of an Education Award that a member can expect to earn is computed by the dollar amount of the Education Award that the member will receive for that term of service divided by the dollar amount of a full-time Education Award in the fiscal year that the VISTA member took the oath for the term of service. In effect, a full-time Education Award has a value of 1.00. Prorated Education Awards and Education Awards received by Summer Associates have values that are less than 1.00

Appendix 25A provides examples of how to calculate the value of Education Awards earned for various scenarios and the eligibility for earning additional awards.

$\frac{\text{Dollar amount of award(s) received by member}}{\text{Dollar amount of full-time award in fiscal year the member was sworn in for each award}} = \text{Value of award(s) earned}$

ZERO DOLLAR VALUE EDUCATION AWARDS

VISTAs who have already received the aggregate value of two Education Awards are able to elect the Education Award as their end of service option. The value of the award is \$0 but the member receives the following Education Award benefits:

- Forbearance of student loans during their term of service
- Payment of the interest that accrued on their student loans during their term of service

TIME LIMIT ON USE OF EDUCATION AWARD

Each Education Award must be used within seven years of completion of the service period. The expiration dates for each of the awards that an AmeriCorps member has received is available under the *My Education Award of an individual VISTA's My AmeriCorps page*. Each of the awards earned will be listed and each award will show the expiration date.

Notices are sent to all individuals approximately six to twelve months prior to the expiration of their awards. Notice is sent by email to the email address listed in the VISTA's My AmeriCorps portal.

EXTENSION OF THE EDUCATION AWARD

Individuals who have earned Education Awards or have received transferred awards may be eligible to extend the original period of time within which they can use their Education Awards. The Corporation for National & Community Service (CNCS) may extend this "use period" under certain limited circumstances. In order to be considered for an extension, an individual must have:

- performed another term of national service during the previous award's original use period
OR
- been unavoidably prevented from using the award during the previous award's original use period

All requests for extensions must be submitted before the award's original expiration date.

VISTA may request an extension of the original use period online, through *My AmeriCorps*, as explained below under “Members’ Access to Information and Awards Payments,” or by sending a letter or fax to the Trust. Requests submitted by letter or fax are effective as of the date they were sent. For letters, this will be the postmark date. For faxes, this will be the date on the fax showing when it was sent.

NOTE: Currently, My AmeriCorps.gov does not recognize a term of VISTA service in which an individual received an end-of-term stipend rather than an Education Award. If a member served a subsequent term in VISTA for which the VISTA received an end-of-term stipend rather than an Education Award, the VISTA may be eligible for an extension but should submit their request in writing.

Requests for extensions must be submitted before the award's original expiration date. To allow adequate processing time, extension requests should be submitted at least 60 days before the original expiration date.

For more information, see: <http://www.nationalservice.gov/programs/ameri-corps/alumni/segal-ameri-corps-education-award/extending-education-awards-use-period>

Qualified Loans and Eligible Institutions

QUALIFIED STUDENT LOANS

Former VISTAs can use their Education Awards to repay qualified student loans they have or may acquire. A “qualified student loan” is a student loan backed by the federal government under Title IV of the Higher Education Act (except PLUS loans to parents of students) and under Title VII or VIII of the Public Health Services Act. The Trust cannot authorize payment of nonqualified loans.

Legislation now includes loans made directly to individuals by a state agency, such as a State Commission on Postsecondary Education, or a state university or college. However, this adjustment is subject to change each year with CNCS’s appropriation statute.

The Segal AmeriCorps Education Award cannot be used to repay any other type of loan, even if it was obtained for educational purposes. Individuals must be sure to ask their loan holders to confirm whether the loans are qualified. It is a wise practice to obtain written confirmation.

ELIGIBLE INSTITUTIONS OF HIGHER EDUCATION

For purposes of the Education Award, an eligible institution of higher education is a school that participates in federal student aid programs, which means the institution has an agreement with the U.S. Department of Education whereby students at the school are eligible to receive federal financial assistance to attend the school. Federal student aid is authorized under Title IV of the Higher Education Act; thus, eligible schools are frequently referred to as “Title IV schools”. A school may be fully

accredited and offer quality graduate degrees, but unless it is a school that participates in Title IV financial assistance program, it is not considered a Title IV school.

In addition to Title IV schools, the Serve America Act of 2009 expanded the use of Education Awards for U.S. veterans. Veterans may use their Education Awards for courses, programs of education, apprenticeships, and on job training programs that have been approved by the Secretary of Veterans Affairs. Education awards can be used by non-veterans only during a narrow window, which depends on when the member's eligibility for an Education Award was certified (approved) by an authorized CSO staff.

Special rules exist for using an award for educational programs that are G.I. Bill approved, but the institution or establishment offering the program is not a Title IV school. These are called GI-Only programs. The special rules stipulate that:

- An Education Award certified on December 23, 2011, and later, can be used for GI-Only programs only if the member is a veteran
- An Education Award certified between October 1, 2009, and December 22, 2011, can be used for GI-Only programs by both members who are veterans and non-veterans
- No Education Award that was certified prior to October 1, 2009, can be used for a GI-Only program, even if the member is a veteran

If Title IV educational institution offers a G.I. Bill,-approved program, any individual that has an Education Award can use the award to enroll in the course or program because the school meets the Title IV criteria.

VISTAs should make sure the school they wish to attend is eligible or the student loan they expect to repay is qualified before they select the Education Award on their Benefits Election form.

Award Matching

Many institutions of higher education offer to match the Segal AmeriCorps Education Award or make available to AmeriCorps VISTA alumni other financial aid benefits, such as scholarships, tuition waivers, and in-state tuition. To view the list of institutions that offer these benefits, go to:

<http://www.nationalservice.gov/programs/amicorps/segal-amicorps-education-award/matching-institutions>. This link is also available through the help section of *My AmeriCorps*.

Federal Tax Implications

The Internal Revenue Service (IRS) has determined that payments from an Education Award and interest payments made on behalf of a member during a particular calendar year are considered taxable income in that year. Payments are subject to federal taxes in the year the award is used and are reported to the

Internal Revenue Service if they total at least \$600 in the year. By January 31, the Trust sends members an IRS Form 1099-MISC that states the amount reported to the Internal Revenue Service that must be included as income on their previous year's tax return. The Trust does not withhold any amount from the Segal AmeriCorps Education Award.

Members' Access to Information and Awards Payments

ACCESSING INFORMATION ONLINE

The Segal AmeriCorps Education Award process is automated, removing the need to submit paper forms. VISTAs may request payments and submit forms electronically through their online account they created when they enrolled in VISTA. By logging into *My AmeriCorps* and clicking on "My Education Award," VISTAs and alumni can use *My AmeriCorps* to:

- Update their contact information
- Access, create, and submit forms to request:
 - Forbearance of student loans during their term of service (Forbearance Request)
 - Payment of the interest that accrued on their student loans during their term of service (Interest Accrual Benefit Request)
 - Payment of qualified student loans (Education Award Payment Request)
 - Payment of current educational expenses (Education Award Payment Request)
 - Extension of the expiration date of their Segal AmeriCorps Education Award (Award Extension Request)
- View the status of their pending requests
- Check their Segal AmeriCorps Education Award balance
- View their account history

CONTACTING THE NATIONAL SERVICE TRUST

The CNCS Office of the National Service Trust can answer questions about AmeriCorps Education Award benefits. The CNCS has a National Service Hotline with a toll-free number through which customer service representatives can answer general award questions and provide detailed information about specific awards or payments. They can provide assistance for using the online system, *My AmeriCorps*. The National Service Hotline telephone number is 800-942-2677. Customer service representatives staff the Hotline from 9 a.m. - 7 p.m. EST, Monday through Thursday. During high volume months—January, May, June, July, August, and September—the Hotline is also staffed on Fridays. Questions may also be submitted at the National Service Hotline's [Ask a Question](https://questions.nationalservice.gov/app/ask) (<https://questions.nationalservice.gov/app/ask>) page or to:

Office of National Service Trust
Corporation for National and Community Service
250 E Street, SW
Suite 300
Washington, DC 20525

Additional Resources

- [VISTA Member Handbook, Chapter 6](http://vistacampus.org/mod/book/view.php?id=2093&chapterid=2120)
(<http://vistacampus.org/mod/book/view.php?id=2093&chapterid=2120>)
- [Office of the National Service Trust](http://portal.cns.gov/CNCSDepartments/DepartmentoftheChiefOperatingOfficer/-OfficeoftheChiefFinancialOfficer/OfficeofAccountingFinancialManagement/-OfficeofNationalServiceTrust.aspx)
(<http://portal.cns.gov/CNCSDepartments/DepartmentoftheChiefOperatingOfficer/-OfficeoftheChiefFinancialOfficer/OfficeofAccountingFinancialManagement/-OfficeofNationalServiceTrust.aspx>)

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Chapter 26:

Termination of a VISTA and Deselection of a Candidate

Chapter Owners: VISTA Management, and Office of General Counsel

Effective Date: October 15, 2016

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Overview of the Termination and Deselection Process

From time-to-time, even though the CNCS State Office (CSO) has carefully developed and approved projects, sponsors, and VISTA applicants, unforeseen events occur. For example, the project loses a key financial supporter; key sponsor staff leaves the organization; the VISTA becomes seriously ill; the VISTA does not perform adequately despite excellent references; the candidate displays unacceptable behavior at PSO; or undisclosed criminal history is discovered. In such instances, the CSO must act to resolve the untenable situation. Depending on the seriousness of the situation and alternatives for resolution, the CSO may be faced with the deselection of the candidate or the early termination of the VISTA for cause, for lack of suitable assignment, or for medical reasons.

Termination proceedings for VISTA Summer Associates are very similar to those for full-time VISTA members, but there are two significant differences. First, due to the condensed service term for VISTA Summer Associates, the response time is shortened to three to five days. Second, even though VISTA Summer Associates are held to the same standards as full-time VISTA members in regards to performance and conduct, VISTA regulations are not cited in the termination proceedings.

Below are the steps to take when terminating a VISTA and five tips to guide the CSO through the termination or deselection process. Also given are termination templates, prepared by the Office of General Counsel, for use in documenting the termination/deselection process.

All proposed terminations cases must go through the Office of General Counsel (OGC).

Early Termination for Cause

CNCS may terminate a VISTA based on conduct and/or performance deficiencies (termination for cause) for the following reasons, as specified under 45 CFR §§ 2556.400-b(1)–(7)⁵²:

⁵² [45 CFR §§ 2556.400-b\(1\)–\(7\) \(2016\)](#).

- Conviction of any criminal offense under Federal, State, or local statute or ordinance [45 CFR § 2556.400-b(1)]
- Violation of any provision of the Domestic Service Volunteer Act of 1973, as amended, or any CNCS or VISTA program policy, regulation, or instruction [45 CFR § 2556.400-b(2)]
- Failure, refusal, or inability to perform prescribed project duties as outlined in the project plan, assignment description, or as directed by the sponsor to which the VISTA is assigned [45 CFR § 2556.400-b(3)]
- Involvement in activities which substantially interfere with the VISTA's performance of project duties [45 CFR § 2556.400-b(4)]
- Intentional false statement, misrepresentation, omission, fraud, or deception in seeking to obtain selection as a VISTA in the VISTA program [45 CFR § 2556.400-b(5)]
- Any conduct on the VISTA's part that substantially diminishes his/her effectiveness as a VISTA [45 CFR § 2556.400-b(6)]
- Unsatisfactory performance of assignment [45 CFR § 2556.400-b(7)]

Deselection Prior to Being Sworn In as a VISTA

To ensure that sponsors receive VISTAs who meet or exceed performance and conduct expectations, CNCS may deselect a VISTA candidate before enrollment in the VISTA program for a range of reasons, including:

- Failure to meet PSO training selection standards which include, but are not limited to, the following types of conduct:
 - Inability or refusal to perform training assignments
 - Disruptive or inappropriate conduct during the PSO event
 - Failure to attend PSO sessions
- Refusal to accept the VISTA placement
- Other misconduct toward the project or CSO prior to VISTA placement

See Template 26E for guidance on documenting a deselection.

Medical Termination

If a VISTA is unable to resume project duties because of a medical condition, or if it reasonably appears that a VISTA is not able to resume project duties within the approved medical leave period, the VISTA is subject to medical termination. A VISTA enrolled in the health benefit plan is also subject to termination due to depletion of hospitalization benefits (see VDR Chapter 24: Health and Child Care Benefits for guidance). The VISTA program does not make the same stipulation for members currently covered by the healthcare allowance.

The CNCS State Director decides whether to terminate a VISTA for medical reasons on the basis of information received from the attending doctor/medical professional or other credible information obtained by CNCS. Such medical documentation should be on official letterhead and include the medical provider's contact information. The CSO sends the documentation in a sealed envelope to the VMSU for inclusion in the VISTA's primary file and notifies the VMSU of the medical termination for medical reasons via the additional comments section of the member's completed Future Plans Form.

After full recovery following a medical termination, individuals may reapply to the VISTA program and start a new, full term of VISTA service with full benefits. However, if the VISTA reapplies to serve, there is no guarantee they will be able to serve at the same site or with the same project.

Termination for Non-Compliance with Fingerprint Requirements

Members who do not submit fingerprint cards to VISTA HQ by the deadline will be terminated from service according to [45 CFR § 2556.400\(b\)\(2\)](#) (Violation of any provision of the Domestic Service Volunteer Act of 1973, as amended, or any CNCS or VISTA program policy, regulation, or instruction). VISTA HQ reminds members to submit completed fingerprints cards to VISTA HQ by their appropriate deadline at PSO, on PSO Blend webinars, and through targeted emails.

If a member is unable to meeting the original fingerprint submission deadline, they must request an extension *before the original deadline passes* by contacting VISTAfingerprint@cns.gov. Extension requests will be considered on a case-by-case basis.

VISTA sends the following reports to the CSO to help monitor this process:

- Missing Fingerprint Report: Members who have not turned in their fingerprint cards five (5) days before the deadline
 - State Office Action: Contact member and sponsor to ensure the member submits prints to HQ by the deadline
 - Begin prepping admin hold/proposed termination paperwork
- Admin hold/Termination Proposal Report: Members must be terminated for not submitting fingerprint cards
 - VISTA will send the report to CSO, Area Manager, OGC and VISTA leadership
 - State Office Action: Initiate administrative hold/termination proposal process

VISTA HQ will provide the CSO with relevant dates, terms of art and citations that can be inserted into the proposed termination letter. The VISTA member will have the additional 10 days of Administrative Hold in which to submit his/her fingerprints and avoid termination of service.

If the CSO proposes termination of a member for reasons in addition to the failure to submit fingerprint cards by the deadline, the CSO should use standard procedures and templates (Appendix 26A-H). The fingerprint termination templates (26G) are not appropriate.

Termination Due to a Member's Criminal History

If a member's criminal history requires additional adjudication/information, VISTA HQ may directly contact the member and/or the CSO. Please note, however, that the member's criminal history **will not and must not** be shared beyond the CSO responsible for the member, VISTA leadership, and when required, OGC and the Area Manager. Other OFL and CNCS staff, and external parties, including the implicated sponsor, may not receive details of an individual's criminal history.

If the VISTA program determines a member's criminal history may be a risk to the program, the adjudicator, will determine the next steps, to contact the member or contact the CSO, as outlined below.

Contact Member

VISTA HQ will contact by phone or email the member to determine the circumstances surrounding the conviction. VISTA HQ may need the CSO to develop a Criminal History Justification Form or follow up with the Sponsor as well as the Area Manager depending on the nature of the history. VISTA HQ records the outcome of the review in the Portal.

Contact CSO

VISTA HQ will contact the CSO when there is a criminal history that is disclosed without the CSO's knowledge, when a CHJF must be submitted, and/or when VISTA HQ must verify that the sponsor has been informed and continues to support the member's service. The CSO has five business days to propose termination or recommend clearance to continue to serve.

On, if not before, the fifth day, the CSO must either:

1. Contact OGC and begin proposed termination proceedings.
 - a. After consultation with OGC, if it is determined to propose termination, the CSO must immediately propose termination and place the member on Administrative Hold using Template letters 26B. VISTA HQ can, upon request, provide relevant dates, terminology and citations that can be inserted into the proposed termination letter. Please note that a member's criminal history record cannot be shared by VISTA HQ or the CSO with the sponsor or any external party. However, the member can and must share his/her criminal history with the sponsor. VISTA HQ documents the outcome of the review in the Portal.
2. Complete a Criminal History Justification Form CHJF and recommend that the member continue to serve despite the criminal history and/or failure to disclose.

- a. To propose continued service, the CSO must submit a CHJF to vistafingerprint@cns.gov within five business days of being notified of the member's criminal history. VISTA HQ will review the CHJF and accept or deny the CHJF within two business days. VISTA HQ will document the outcome of the review in the Portal.
 - i. If the CHJF is denied, VISTA HQ will notify OGC and CSO to propose termination.

If the CSO fails to submit a proposal within five business days, the Area Manager will be notified.

If, in the rare circumstance that a member's criminal history requires immediate removal from service, VISTA HQ will contact OGC, the Area Manager and the State Office. The CSO will initiate termination proceedings.

A criminal report that requires immediate dismissal of a member includes, but is not limited to:

- Appearance on the National Sex Offender Public Website
- Past history of sexual abuse of children under the age of 18
- Conviction of a crime in which children were victimized
- Currently awaiting trial or on probation or parole. Only under unusual, extenuating circumstances shall VISTA consider an individual for VISTA service who is on probation or parole

Removal from Project

Removal of a VISTA from serving in a particular project sometimes occurs. There are two general reasons such a removal may occur:

- A project sponsor requests a VISTA's removal⁵³
- A project cannot continue to operate all or part of its VISTA project

The sole authority for terminating (or transferring) a VISTA member rests with VISTA Program.⁵⁴ Additionally, the VISTA Program has the authority to remove a VISTA member from a project without the consent or request of the sponsor.⁵⁵

Administrative Hold Status

WHAT IS ADMINISTRATIVE HOLD STATUS?

Administrative Hold is an excused absence with pay status that CNCS accords to a VISTA while s/he is enrolled in the VISTA program but is not reporting to a VISTA project site. Administrative Hold has

⁵³ [45 CFR §2556.410 \(2016\).](#)

⁵⁴ [45 CFR §2556.405 \(2016\).](#)

⁵⁵ [45 CFR §2556.415 \(2016\).](#)

certain similarities to administrative leave in the traditional workplace. However, Administrative Hold is not a type of leave that a VISTA requests or initiates, such as personal leave or medical leave. Rather, it is a status imposed by CNCS at its discretion, not by the VISTA. While in Administrative Hold status, the VISTA member should not, and is directed not to, report to any VISTA project site for service.

WHO MAY PLACE A VISTA MEMBER ON ADMINISTRATIVE HOLD? WHO CANNOT?

Only CNCS has the ability and authority to place a VISTA member in Administrative Hold status. Administrative Hold of a VISTA is carried out by the CNCS State Office that has oversight over the VISTA in question. Neither a VISTA project nor a VISTA has the authority to place a VISTA on Administrative Hold. **CNCS State Office staff must consult with the appropriate Area Manager on all Administrative Hold proceedings prior to activation.**

IS A VISTA CONSIDERED ENROLLED IN THE VISTA PROGRAM WHEN S/HE IS IN ADMINISTRATIVE HOLD STATUS?

Yes. Whether a VISTA is currently assigned to a particular VISTA project or s/he is on Administrative Hold, the member is considered enrolled in the VISTA program. All applicable terms, conditions, and benefits of being in the VISTA program apply to the VISTA during those periods.

WHILE ON ADMINISTRATIVE HOLD, IS THE VISTA MEMBER STILL ASSIGNED TO THE PROJECT WHERE S/HE WAS PREVIOUSLY SERVING?

No. While on Administrative Hold, a VISTA is no longer assigned to the prior project. A VISTA cannot simultaneously be assigned to a project and be on Administrative Hold.

WHEN SHOULD A CNCS STATE OFFICE PUT A VISTA IN ADMINISTRATIVE HOLD STATUS?

Whenever a CNCS State Office removes a VISTA from a project, the State Office must put the VISTA on Administrative Hold, regardless of next steps — e.g., initiating termination proceedings; giving an opportunity to secure reassignment; or removing a VISTA from a project for a few days prior to medically terminating the VISTA. When a CNCS State Office removes a VISTA from a project but the VISTA remains enrolled in the VISTA program, the VISTA should be placed in Administrative Hold status.

HOW DOES A CNCS STATE OFFICE PUT A VISTA IN ADMINISTRATIVE HOLD STATUS?

The State Office completes and submits the Administrative Hold form through the staff portal. From the VISTA Member's Home Page, click on the link "In-Service Actions" on the left hand column. Select "Admin Hold" for the "In-Service Action" Form Type drop-down menu and fill out all fields. Once submitted requests will show in the VMSU's In-Service Requests Workbasket. After receiving the request, the VMSU will process the administrative hold for the appropriate effective date. If the effective date of the assignment update occurs in the future, the request cannot be processed until that date. Should there be an issue with the request the VMSU will return the request. A notification email will be sent to the State Office based on the member's current managing State Office of his/her current program. Emails will notify State Office staff to revise and resubmit forms that have been returned by the VMSU and have not been approved. The VMSU will leave notes in the VMSU comments section detailing why the request was returned.

SHOULD A CNCS STATE OFFICE CHANGE A VISTA MEMBER'S PAY PLAN WHILE PUTTING A VISTA IN ADMINISTRATIVE HOLD STATUS?

Most VISTAs should not be re-coded when they are put on administrative hold. Only Q09 Cost-Share VISTA members who are placed on Administrative Hold status need to be re-coded in the portal. A Q09 Cost-Share VISTA member must be re-coded as an A22 standard VISTA member for the duration of the Administrative Hold period, regardless of whether the member will continue to be paid during that time.

HOW LONG SHOULD ADMINISTRATIVE HOLD LAST? HOW LONG IS TOO LONG?

A VISTA serving a regular yearlong term should not be in Administrative Hold status beyond 30 calendar days. To the extent practicable, the CNCS State Office should aim at having the Administrative Hold period not exceed 30 days. A term of service in the VISTA Program is usually no more than one year. For this reason, placement in Administrative Hold status beyond 30 days becomes excessive and runs counter to the mission and objectives of the VISTA program. Administrative hold for a VISTA Summer Associate should not exceed 5 days.

WHAT SHOULD A CNCS STATE OFFICE DO IF IT EXPECTS A VISTA MAY BE ON ADMINISTRATIVE HOLD FOR MORE THAN 30 DAYS?

If a CNCS State Office sees the period of time that a VISTA is on Administrative Hold is approaching 30 days, it is a "red flag" for immediate action. The CNCS State Program Director should consult about the next steps with the Area Manager, and if any issues remain, with VISTA program's legal counsel.

WHAT IF A VISTA HAS COMPLAINED OF DISCRIMINATION TO THE CNCS OFFICE OF CIVIL RIGHTS AND INCLUSIVENESS AND IS NOW ON ADMINISTRATIVE HOLD? HOW LONG SHOULD THE VISTA REMAIN ON ADMINISTRATIVE HOLD?

All VISTAs have the right to engage in protected activity, such as filing a discrimination complaint with the Office of Civil Rights and Inclusiveness (OCRI). In such a case, the same rules regarding Administrative Hold discussed above apply. No VISTA, regardless of whether or not s/he has complained of discrimination to OCRI, should be on Administrative Hold for more than 30 days. Administrative Hold should not last for an indefinite period, even while allegations of discrimination are reviewed or investigated. The CNCS State Office should place the VISTA on Administrative Hold, if it is inappropriate for the VISTA to remain at the project, and should either provide the VISTA an opportunity to secure reassignment or initiate termination for cause proceedings, as appropriate.

WHILE ON ADMINISTRATIVE HOLD STATUS, SHOULD A VISTA MEMBER CONTINUE RECEIVING THE VISTA LIVING ALLOWANCES?

Generally, yes. A VISTA on Administrative Hold should continue to be paid living allowances, even if a VISTA is proposed to be terminated for cause while on Administrative Hold. On rare occasions, it may be appropriate to place a VISTA on Administrative Hold without pay, e.g., it has been at least a week since a VISTA is believed to have “abandoned” the project, or an individual purports to be a VISTA but is not because s/he does not actually report to service at the project. On such rare occasions, the CNCS State Office should consult with the Area Manager and Office of General Counsel.

WHAT IF I HAVE QUESTIONS RELATED TO ADMINISTRATIVE HOLD FOR A VISTA?

If a CNCS State Office has questions related to a VISTA’s placement on Administrative Hold, the State Office Director should consult with the appropriate Area Manager, and if any issues require further consultation, with the VISTA program’s legal counsel. For all other offices, identify the appropriate State Office that oversees the particular VISTA, and contact the State Director of that office for assistance.

Opportunity for Resignation

In all cases, a VISTA has the opportunity to resign in lieu of termination. Upon resignation, rights to appeal and rights to end of service benefits are null and void. See templates for guidance on confirming a resignation.

At any time, a VISTA may choose to resign for personal reasons and provide a two-week notice to the sponsor and the CSO. The *Member Handbook* advises VISTAs that when practicable, notice of resignation should be given 30 days in advance to minimize disruption to the project.

In some circumstances, a VISTA who leaves service early for a compelling personal circumstance may qualify for a prorated end-of-service stipend or Education Award. However, a VISTA’s voluntary resignation, by itself, is never sufficient to meet the standard for a compelling personal circumstance. See “Early Termination of a VISTA for a Compelling Personal Circumstance” below.

Steps in the Termination Process

The following chart lists the steps to take when considering a termination. Ideally, the sponsor and the VISTA will have been in contact with the CSO when the problem first became evident. At that time, the CSO works with the sponsor and/or the VISTA to solve the problem. If resolution is not possible, take the following steps, as warranted. Often events occur quickly and several steps need to be taken simultaneously or in quick succession.

1.	A need to remove a VISTA from the project is identified by either a request from the sponsor to the CSO, or by the CSO without the sponsor’s request
2.	The requesting party (sponsor or CSO) writes a request for termination stating the reason(s) and includes copies of all supporting documentation (if sponsor-generated, sponsor sends to CSO; if CSO-generated, CSO keeps for the file)
3.	The CSO conducts a preliminary analysis (VISTA member input and sponsor input) to determine an immediate course of action (for example, place the VISTA on administrative hold [<i>see Template 26A</i>]), or no immediate action is necessary
4.	After a preliminary determination is made, the CSO continues to gather additional information from the VISTA and the sponsor
5.	The CSO analyzes the documentation and information provided by the sponsor and the VISTA and determines (a) whether evidence exists to show a violation of one or more of the reasons listed above under “Early Termination for Cause” or “Medical Termination”; (b) whether the incident is serious enough to warrant early termination for cause or medical termination; or (c) whether the opportunity to transfer to another project is a viable option
6.	The CSO briefs the Area Manager
7.	The CSO and Area Manager agree on a course of action in consultation with the Office of General Counsel and cc’ing VISTACase@cns.gov (See Chapter 31: When you need to talk to a person for details regarding VISTACase@cns.gov)
8.	The CSO implements the course of action in writing to the VISTA: early termination (<i>see Templates 26B-2-4</i>); medical termination (<i>see Template 26C-2</i>); or opportunity to transfer to another project (<i>Templates 26D-2-5</i>)
9.	At the same time that the CSO sends the first letter to the VISTA in step 8, the CSO sends a letter to the sponsor stating the VISTA is removed from the project and the CSO is notifying the VISTA. (At this point, there is no more discussion of this VISTA with the sponsor, unless further documentation is needed.)

TIP 1 – TAKE CHARGE

CNCS is fully responsible for the termination process, not the sponsor or project.

- CNCS entirely “owns” the process to terminate a VISTA from service
- Only CNCS has the legal authority and ability to terminate a VISTA from service
- Only CNCS may remove a VISTA from a project or site
- The sponsor has no authority to remove or terminate a VISTA, regardless of performance or conduct of the VISTA
- The sponsor or project may request the CSO to remove a VISTA from the project or site; sponsor request must be in writing
- The CSO’s decisions and actions relative to removal or termination must be reflected in letters to the sponsor and the VISTA
- Although the sponsor has no authority to remove or terminate a VISTA, the CSO needs cooperative communication with the sponsor during and after the removal of VISTA member from the project
- CSO may need to obtain written information and evidence related to the sponsor’s request for the VISTA’s removal, to determine what CSO steps are appropriate; that is, proposed termination for cause or opportunity for reassignment

TIP 2 – ACT WHEN ACTION IS NEEDED

Do not rely on the problem going away, if the VISTA’s conduct or performance is poor.

- After removing a VISTA from a project, do not give the VISTA an opportunity for reassignment if it is not warranted, use the “for cause” procedures
- Do not misuse the “reassignment or termination for lack of suitable assignment” procedures when “for cause” procedures are appropriate
- Avoiding the appropriate course of action presents potential legal and programmatic problems
- The VISTA has the opportunity to voluntarily resign at any point

TIP 3 – LEAD ALL COMMUNICATIONS

Do not create communication triangles. The CSO leads all communications.

- Keep all communications, written and oral, strictly one-on-one between the CSO and the VISTA when the CSO is:
 - Removing the member from the project
 - Giving the member an opportunity to be reassigned
 - Proposing to terminate or terminating the VISTA member
- Do not include the prior sponsor in the communications

- Once the VISTA member has been removed from the project, the sponsor plays no further part in the VISTA's status in the VISTA program
- If the CSO wants to have the Office of General Counsel (OGC) communicate with a sponsor, the CSO must participate in and lead all such communications
- OGC is legal counsel for the CSO, not the sponsor; OGC cannot engage in communications with the sponsor without the presence of the CSO

TIP 4 – CONSULT WITH THE AREA MANAGER

Do not attempt an early termination for cause or medical termination alone. The VISTA early termination process can be rather complicated. When a situation arises or a sponsor's request for removing a VISTA arrives, follow the steps above and consult the Area Manager to obtain advice before beginning the termination process.

- The process has legal and programmatic ramifications.
- The case to terminate must be solidly backed with credible evidence and able to stand up to appeal or other independent examination
- Handle the early termination process of a VISTA carefully, be fair to the VISTA, and avoid creating liabilities for CNCS (including time and resources dedicated to defensive litigation)
- The Area Manager and/or the CSO consult with OGC in problematic situations

TIP 5 – START WITH THE TEMPLATE LETTERS

The appendices to this chapter include template letters, developed by VISTA Legal Counsel, to help guide the termination process. Choose the appropriate letters and insert information relevant to the situation.

Early Termination of a VISTA for Non-Compelling Circumstance

In most cases, a VISTA leaves service early for a non-compelling circumstance. In these cases, the individual does not qualify for a prorated end-of-service stipend or Education Award. Non-compelling personal circumstances include resigning, poor performance or misconduct, leaving a program to enroll in school, or to obtain full-time employment (other than described in the next section regarding early termination for compelling, personal circumstances), or because of dissatisfaction with the program.

Early Termination of a VISTA for a Compelling, Personal Circumstance^{56,57}

In some cases, a VISTA leaves service early for a compelling, personal circumstance and, thus, may qualify for a prorated end-of-service stipend or Education Award.

The CNCS State Office has the responsibility to verify circumstances and submit documentation to the VMSU. The VMSU then reviews that information and proceeds accordingly. If and only if the member leaves service early because of a compelling personal circumstance set forth on the following list, they are eligible for a prorated end of service stipend or prorated Education Award:

- Serious medical condition or disability of the VISTA member, which prohibits the member from effectively completing his/her term of service
- Death, critical illness, or disability of an immediate family member (spouse, domestic partner, parent, grandparent, sibling, child, or legal guardian), if this event makes completing a term unreasonably difficult or impossible
- Conditions attributable to either nature or the project and not to the VISTA member, such as natural disaster, strike, or premature closing of a project that makes completing a term unreasonably difficult or impossible. In such cases, the VISTA member must also demonstrate that it is unreasonably difficult or impossible for him/her to continue service at another VISTA project. The VISTA member must show that either: no VISTA positions are available in his/her geographic area to which s/he can secure reassignment; or, despite making good faith efforts to secure a reassignment to another VISTA project, the VISTA member is unable to do so. Lack of suitable assignment by itself is not a compelling personal circumstance

A prorated end-of-service stipend or Education Award may also be given for public policy reasons or other extenuating circumstances, as determined by CNCS, such as:

- Fulfilling military service obligations
- Fulfilling jury duty obligations
- Electing not to complete service after a period in deferral of service status
- Accepting permanent employment by a member who is a recipient of Temporary Assistance to Needy Families
- Accepting another AmeriCorps or NCCC position (if the VISTA member has served at least 335 days)
- Accepting a Peace Corps Volunteer position (if the VISTA member has served at least 335 days)

⁵⁶ [45 CFR §2522.230 \(2016\)](#).

⁵⁷ [12-003: Documentation of Member Early Terminations for Compelling Personal Circumstances \(2016\)](#).

Generally, VISTAs have the responsibility for demonstrating a compelling personal circumstance that prevents them from completing their term of service. VISTAs must communicate and provide documentation of these circumstances to the CNCS State Office for a review. In the case of early terminations that result from conditions attributable to the program and not the VISTA member, depending on the circumstances, members may not need to provide documentation.

The CSO reviews the relevant documentation to ensure the member's departure from their service is indeed a compelling personal circumstance. In cases where the request for early termination because of a compelling personal circumstance is affirmed, the CSO must forward the documentation to the VISTA Member Support Unit (VMSU). In cases that require medical documentation, such documents must be maintained in a sealed envelope in the VISTA's primary file. The prorated end of service stipend or prorated Education Award is released to the member once the VMSU has received and filed relevant documentation.

TYPES OF ACCEPTABLE DOCUMENTATION TO SHOW A COMPELLING, PERSONAL CIRCUMSTANCE

- **Serious medical condition or disability of the VISTA** – Documentation from the treating physician or other medical provider that indicates the VISTA is unable to continue to serve because of a serious medical condition or a disabling condition. Documentation should be on official letterhead and include the medical provider's contact information. Such documentation must be maintained in a sealed envelope in the VISTA's primary file
- **Critical illness or disability of an immediate family member** – Documentation from the treating physician or other medical provider that indicates an immediate family member has a critical illness or disabling condition. Documentation should be on official letterhead and include the medical provider's contact information. Such documentation must be maintained in a sealed envelope in the VISTA's primary file
- **Death of an immediate family member** – A copy of the death certificate, reference to a published obituary, or other official written documentation of death (e.g., copy of newspaper article)
- **Conditions attributable to either nature or the project and not to the VISTA member, when the VISTA member demonstrates that it is unreasonably difficult or impossible for him/her to continue service at another VISTA project** – Member submitted documentation varies and is assessed on a case-by-case basis. The CSO must review each case with the Office of General Counsel (OGC), who will either approve or deny a VISTA member's exit for compelling, personal circumstances
- **Fulfilling military service obligations** – A copy of the VISTA's orders to report for military service
- **Fulfilling jury duty obligations** – A copy of the court notice requiring the VISTA to report, as well as selection, for jury duty

- **Electing not to complete service after a period in deferral of service status** – Documentation showing deferral of service taken (e.g., copy of military leave orders showing such leave lasted more than 30 days but less than two years; copy of jury duty documentation showing jury duty lasted more than 30 days)
- **Accepting employment by a member who is a recipient of Temporary Assistance to Needy Families** – Documentation indicating VISTA member is a TANF recipient from the appropriate government office and documentation of employment acceptance from the employer
- **Accepting another AmeriCorps or NCCC position (if VISTA has served at least 335 days)** – Documentation of the VISTA’s acceptance into the AmeriCorps or NCCC program and training or start date

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Chapter 27: *Reserved*

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Chapter 28: Life After VISTA

Chapter Owners: Marketing, Outreach, & Recruitment

Effective Date: October 15, 2016

Reviewed: September, 2016

Job Seeking Assistance

VISTA CAMPUS JOB BOARD

When actively searching for jobs, CSOs should encourage AmeriCorps VISTA members and alums to visit the [VISTA Campus Job Board \(https://www.vistacampus.gov/jobs\)](https://www.vistacampus.gov/jobs) frequently to view and apply to postings. The Marketing, Outreach, and Recruitment Team within AmeriCorps VISTA manages this site and promotes it to employers. Candidates can filter by location, focus area, and/or NCE status.

HOW TO USE NONCOMPETITIVE ELIGIBILITY⁵⁸

One of the benefits of successfully completing one year of service as a VISTA is the option to use the Noncompetitive Eligibility (NCE) hiring status to help obtain federal employment.

- NCE is a special hiring appointment granted to returned Peace Corps Volunteers and AmeriCorps VISTA alumni in Executive Order No. 11103 (April 10, 1963).” – Section 415(d), Title IV, of the Domestic Volunteer Service Act of 1973, as amended
- NCE permits (but does not require) a federal agency to hire an RPCV or VISTA alum who meet the minimum qualifications for the position.
- An agency may extend the NCE period for 2 more years if the person, after the qualifying service, is:
 - In the military service;
 - Studying at a recognized institution of higher learning; or
 - Engaged in another activity which, in the hiring agency’s view, warrants extension.
- The use of NCE status is up to the federal hiring manager
- VISTA alumni can use their Verification of VISTA service letter as documentation for their NCE status.
- Resources for further understanding NCE:
 - VISTA Campus (<https://www.vistacampus.gov/after-vista/career>)

⁵⁸ [45 CFR §2556.340 \(2016\)](#).

- USAJobs Help Center (<https://www.usajobs.gov/Help/working-in-government/unique-hiring-paths/peace-corps/>)

EMPLOYERS OF NATIONAL SERVICE INITIATIVE

President Barack Obama launched [Employers of National Service \(EONS\)](http://www.nationalservice.gov/special-initiatives/employers-national-service) (<http://www.nationalservice.gov/special-initiatives/employers-national-service>) at a White House ceremony commemorating the 20th anniversary of AmeriCorps in September of 2014. The purpose of this initiative is to create a talent pipeline connecting AmeriCorps and Peace Corps alumni with leading employers from the private, public and nonprofit sectors.

Learn more about [Employers of National Service](http://www.nationalservice.gov/special-initiatives/employers-national-service) (<http://www.nationalservice.gov/special-initiatives/employers-national-service>) and see a full [list of participating employers](http://www.nationalservice.gov/special-initiatives/employers-national-service/sign-now) (<http://www.nationalservice.gov/special-initiatives/employers-national-service/sign-now>).

The [Alumni section](http://www.nationalservice.gov/special-initiatives/employers-national-service/alumni) (<http://www.nationalservice.gov/special-initiatives/employers-national-service/alumni>) features job-seeking resources, including:

- Understanding Benefits of Service
- National Service Resume Basics
- Creative Networking
- Answering FAQs from Employers
- Employment and Alumni with Disabilities

Using the Benefits

VERIFICATION OF SERVICE REQUESTS

VISTA alumni often require proof of service, whether to lease an apartment, provide to a potential employer—especially when obtaining a federal position—or prepare for retirement.

Verification of Service letters can be accessed directly through [My.AmeriCorps.gov](https://my.americorps.gov) (<https://my.americorps.gov/>). The [Certification of Service](http://vistacampus.org/mod/resource/view.php?id=2472) (<http://vistacampus.org/mod/resource/view.php?id=2472>) hyperlink on the [VISTA Campus Alumni page](https://www.vistacampus.gov/alumni-welcome-and-faq) (<https://www.vistacampus.gov/alumni-welcome-and-faq>) includes instructions on how to print the letter.

Requests to verify service dates and wage information from employers, mortgage companies, etc., should be directed to the National Service Hotline.

APPLYING VISTA SERVICE TOWARDS FEDERAL BENEFITS/RETIREMENT

Alumni can count their service year(s) towards vacation accrual and retirement with the federal government.

VISTA alumni may make a service credit deposit payment for any period of VISTA service (excluding training time), regardless of when the service was performed. Paying the service credit deposit will make this volunteer time creditable toward federal retirement. VISTA alumni who become federal employees must contact the Human Resources/Benefits personnel at their current federal agency to initiate the deposit process and to make sure they are accruing vacation at the appropriate rate.

USING THE SEGAL AMERICORPS EDUCATION AWARD

The VISTA Campus features an [Education Award Website](http://vistacampus.org/mod/resource/view.php?id=2472) (<http://vistacampus.org/mod/resource/view.php?id=2472>) that instructs members and alums on how to use the award and explains other post-service opportunities related to school and student loans.

Many higher learning institutions offer a variety of incentives to AmeriCorps alumni, such as scholarships, matching tuition funding, or waiving application fees. More information can be found at: [http://www.nationalservice.gov/programs/american-corps/alumni/segal-american-corps-education-award/segal-american-corps-education-award](http://www.nationalservice.gov/programs/americorps/alumni/segal-american-corps-education-award/segal-american-corps-education-award).

Ways to Engage as an Alum

STORIES OF SERVICE

CSOs should encourage VISTAs, alumni, sponsors, and staff to [submit stories](https://www.vistacampus.gov/stories-service) (<https://www.vistacampus.gov/stories-service>) of their VISTA service online or via email to vistaoutreach@cns.gov. The VISTA Marketing, Outreach, and Recruitment team is always collecting stories to promote AmeriCorps VISTA. By having a story bank, we can be better prepared to fulfill requests from the White House and the Office of External Affairs.

BE AN AMERICORPS VISTA AMBASSADOR

Help us spread the word About AmeriCorps VISTA! Encourage alumni – and State Office staff – to present your service story with high school or college students.

The VISTA Campus houses the [Be an Ambassador](https://www.vistacampus.gov/american-corps-vista-ambassador) (<https://www.vistacampus.gov/american-corps-vista-ambassador>) materials including a PowerPoint template, presentation checklist, and customizable flyer to spread the word about the power of service and what it's like to serve as a VISTA.

Additional Resources

- [AmeriCorps VISTA LinkedIn Page](https://www.linkedin.com/company/AmeriCorps-VISTA) (<https://www.linkedin.com/company/AmeriCorps-VISTA>)
- [VISTA Campus Alumni Forum](https://www.vistacampus.gov/forums/vista-alumni) (<https://www.vistacampus.gov/forums/vista-alumni>)
- Direct Alumni and Life After questions to: VISTAO Outreach@cns.gov

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Chapter 31:

When You Need to Talk to a Person

Chapter Owners: VISTA Management

Effective Date: October 15, 2016

Reviewed: September, 2016

Overview

Many VDR chapters give basic information on the VISTA program's mission, legal framework, funding, policies, and procedures. This chapter describes how to find the right person to talk to when the need arises.

The VISTA policies and procedures are, for the most part, general. Applying the general policies and procedures to specific situations requires thought and analysis, and it is good practice to obtain other views and advice.

Who to Contact

The typical order of contacts when questions arise is:

1. State Program Director
2. Area Manager
3. VISTA HQ

VISTACase@cns.gov

Occasionally, some questions or issues might require input and advice from VISTA's Office of General Counsel representatives. To ensure VISTA HQ is also involved in those discussions and decisions, please copy VISTACase@cns.gov on all email exchanges with General Counsel.

To aid in this process and expedite legal review, OGC and OFL created a template which should be submitted to start the process. The goals of the template are to:

- Ensure that the CSO captures relevant information to present to the Area Manager
- Allow the Area Manager the opportunity to address member issues at the cluster level, heading off OGC engagement if it's not necessary
- Provide OGC with relevant data at the beginning, to head off a time-consuming email exchange with the Area Manager and/or CSO to gather information that is required in virtually all cases

- Provide the CSO an opportunity to state their recommendation
- Allow VISTA HQ to see and analyze the kinds of member actions that are handled by OGC and consider ways to implement system-wide improvements that could prevent problems from occurring in the first place.

A sample VISTACase template is available in Appendix 31A.

VISTA Headquarter Contacts

VISTA Headquarters contacts are organized around topics and geographic areas, as follows:

Topic/Geographic Area		Main Contact	Phone	Alternate Contact	Phone
Programming, impact, operations for projects and sponsors	Atlantic Cluster	Rob Cox	202-606-6851	Marcus Brownrigg	202-606-6693
	North Central Cluster	Craig Kinneer	202-606-6708		
	Pacific Cluster	Marcus Brownrigg	202-606-6693		
	Southern Cluster	Kelly Daly	202-606-6849		
	Southwest Cluster	Calvin Dawson	202-606-6897		
Training candidates, VISTAs, Leaders, supervisors	Leaders	Andy King	202-606-3774	Patrick Triano	202-606-6816
	Pacific Cluster	Calvin Landrum	202-606-6870		
	North Central Cluster	Ericc Powell	202-606-3616		
	Southern Cluster				
	Atlantic Cluster Southwest Cluster	Jessica Burch	202-606-3911		
VMSU (topics related to member experience, member processing)	Pacific Cluster	Tania Veliz Christopher Hawkes	512-391-2919 512-391-2912	Carly Bruder Jennifer Brooks	512-391-2911 512-391-2920
	North Central Cluster	Renika Prater	512-391-2915		
	Atlantic Cluster	Natasha Douglas Andrew Lowe	512-391-2912 512-391-2922		
	Southern Cluster	ShaVonne Walker	512-391-2916		
	Southwest Cluster	Samantha Stout	512-391-2913		
Marketing, outreach, recruitment (and to submit success stories)	All Clusters	Ally Snell	202-606-6719	Liz Matthews	202-606-6774

Topic/Geographic Area		Main Contact	Phone	Alternate Contact	Phone
Fingerprints/CHC	All Clusters	Khadija Carr	202-606-3532	Patrick Triano	202-606-6816
VDR	All Clusters	Molly Pelzer	202-606-6675	Eileen Conoboy	202-606-6871
Cluster call attendees (VISTA staff who attend cluster calls to respond to general questions, clarify details from weekly updates, bring comments back to VISTA, etc.)	Atlantic Cluster	Andrew Lowe Natasha Douglas	512-391-2922 512-391-2921	Carly Bruder Jennifer Brooks	512-391-2911 512-391-2920
	North Central Cluster	Liz Jung	202-606-6855	Ally Snell	202-606-6719
	Pacific Cluster	Kelly Daly	202-606-6849	Marcus Brownrigg	202-606-6693
	Southern Cluster	ShaVonne Walker	512-391-2916	Carly Bruder Jennifer Brooks	512-391-2911 512-391-2920
	Southwest Cluster	Jessica Burch	202-606-3911	Patrick Triano	202-606-6816

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Chapter 32:

Reviewing VISTA Opportunity Listings

Chapter Owners: VISTA Management

Effective Date: October 15, 2016

Reviewed: September, 2016

Introduction: Why Do We Review Listings?

Opportunity listings are public announcements of national service openings on my.americorps.gov that AmeriCorps VISTA candidates read to decide which VISTA opportunities they may want to apply to. CSO staff review, activate, and edit or remove opportunity listings in the Staff Portal that is accessible from the main page of the [CNCS Intranet \(http://portal.cns.gov/\)](http://portal.cns.gov/). Opportunity listings should reflect information provided in the Volunteer Assignment Description (VAD) and be inviting and engaging in tone, as these listings are the forward-facing description of a project to a candidate.

Prior to approving each opportunity listing, CSO staff are expected to review opportunity listings for errors, inappropriate content, and the potential for inappropriate activities. Staff should ensure that the listings are correct, that they do not contain improper requirements, that they do not indicate improper bias, and that no unwarranted benefits or promises are made in the listing.

From prior experience, VISTA headquarters estimates that less than one percent of draft listings contain inappropriate content. Despite the rarity, a strong concern is that these listings may point toward improper activities or potentially undermine the public trust or impair the VISTA mission.

For these reasons, thorough review of opportunity listings is an essential component of CNCS's continuous assessment, oversight, and monitoring for sponsor appropriateness. Hence, the review of opportunity listings should be given similar importance as any other sponsor desk review.

Although inappropriate listings vary in type, they should be treated as "red flags" that require resolution before they may be approved for listing on [my.americorps.gov \(https://my.americorps.gov\)](https://my.americorps.gov). If CSO staff are unsure of how to resolve a potentially inappropriate listing, edit or deactivate (hide) the listing and consult with your State Director or Area Manager.

Areas of Concern

Reviewers of VISTA opportunity listings have noted several areas of concern in past draft listings. CSO staff should address the following concerns, as necessary:

- Direct service
 - For example, providing services directly to clients or engaging in hands-on, physical, or administrative tasks that do not have a capacity-building purpose
- Possible supplanting of staff duties or displacement of staff
 - Member assigned to a position that should be performed by paid staff of the sponsoring organization (e.g., administrative officer or assistant, receptionist, bookkeeper, webmaster)
- Indication of insufficient member supervision or support
 - Member assigned supervisory duties
 - Member not serving locally within the community identified in the sponsor's Application for Federal Assistance
- Potential improper bias
 - Potential bias against AmeriCorps VISTA candidates based on a prohibited factor (e.g., race, color, sex, gender identity, sexual orientation, gender identity, religion, national origin, birth place, age, marital status, child status, family status, disability, and veteran status)
 - Potential discrimination regarding providing services to project beneficiaries based on their membership in a protected class (e.g., race, color, sex, gender identity, sexual orientation, gender identity, religion, national origin, birth place, age, marital status, child status, family status, disability, and veteran status)
 - Statement of candidate preferences outside the areas of knowledge, skills, education, professional experience and abilities should be regarded with caution
- Unclear anti-poverty connection
 - Capacity-building unrelated to anti-poverty outcomes
 - Private sector or for-profit outputs and benefits
 - Potential proselytization (religious or political)
 - Lack of clear and unmistakable separation between the AmeriCorps VISTA assignment and any organizational lobbying or religious activities
- Fundraising for AmeriCorps VISTA cost-share or matching, or for administering an AmeriCorps program
 - Member duties improperly include raising funds for organization to satisfy cost-share or matching, or to administer the organization's AmeriCorps or VISTA programs

PROHIBITED ACTIVITIES

CNCS staff must ensure that service activities described in the position description do not appear to fall into any of the following prohibited activities:

- Attempting to influence the passage or defeat of legislation

- Organizing or engaging in protests, petitions, boycotts, or strikes
- Assisting, promoting, or deterring union organizing
- Impairing existing contracts for services or collective bargaining agreements
- Engaging in partisan political activities, or other activities designed to influence the outcome of an election to any public office
- Participating in, or endorsing, events or activities that are likely to include advocacy for or against political platforms, political candidates, proposed legislation, or elected officials
- 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
- Providing a direct benefit to a business organized for profit, a labor union, or a partisan political organization
- Providing a direct benefit to a nonprofit organization that participates in any campaign on behalf of (or in opposition to) any candidate for elective public office, or that engages in lobbying efforts to pass or defeat legislation

A checklist for ensuring that VISTA opportunity listings are correctly filled out, free of prohibited activities, and devoid of poor content is available in Appendix 32A: VISTA Opportunity Listing Review Checklist.

Consistency and Appropriateness

Opportunity listings for VISTA member assignments need to be consistent with the sponsor’s mission, application narrative, and assigned performance milestones. The program description, program summary, and assignment description (for the VISTA member) should be clearly related and understandable to a member of the public.

Because listings are a first impression for applicants and because listings are accessible to the public, it is important that listings appropriately and transparently reflect the VISTA mission and policy. Furthermore, persuasive and well-written listings will attract high quality candidates for VISTA service, and specifically those willing to serve under the unique attributes that the VISTA program provides.

For instance, a listing that promotes hands-on and direct-service activities will likely attract candidates amenable to these types of inappropriate activities for VISTA members. On the other hand, a listing that correctly highlights the indirect, capacity-building nature of VISTA service will likely appeal to candidates more inclined to understand and promote the mission.

Prior experience indicates that listings afford an important opportunity to identify early potential issues with an assignment. VISTA HQ relies on CSO staff to thoroughly review postings, make necessary changes, and seize opportunities to educate sponsors about VISTA principles and policy.

Recognizing potential issues with an assignment requires using one’s professional judgment. CSO staff should consult with the State Program Director, Area Manager, or VISTA point of contact for assistance.

Listings that Show Potential Improper Bias or Illegal Discrimination

State office staff must ensure that listings do not state or suggest that the organization discriminates against, or shows improper bias toward or against, any VISTA applicant or candidate, based on any of the following statuses:

- Race, or color
- Sex, sexual orientation, gender identity
- Religion
- National origin, or birthplace
- Age
- Marital, child, or family status
- Disability
- Veteran status (Veteran status may be a positive preference but it may not be used for discrimination.)

For example, a faith-based project cannot use religion as a selection preference. A culturally specific project cannot state a preference that can be used to infer race, birthplace, or national origin.

While veteran experience can be used as a positive preference, it cannot be used to discriminate against a veteran. For example, a veterans’ project cannot use medical discharge status to disqualify candidates.

As a general rule and best practice, State Office staff should regard with caution opportunity listings that include preferences beyond the scope of knowledge, skills, education, and professional experience and abilities.

Members of the public, such as project beneficiaries, are also protected from discrimination, based on such protected statuses as religion, in receiving services. For instance, an opportunity listing may not state: “The VISTA member will raise funds for our program that assists former criminal offenders reentering society from prison and who have committed to change their lives through our faith.” The opportunity listing and the activity described are inappropriate for AmeriCorps VISTA resources.

Best Practices for Disability Inclusion

The [White House](#)

(https://www.whitehouse.gov/sites/default/files/docs/employing_people_with_disabilities_toolkit_febr)

[uary 3 2015 v4.pdf](#)) and the [National Service Inclusion Project \(http://www.serviceandinclusion.org\)](http://www.serviceandinclusion.org) have determined best practices in recruitment for individuals with disabilities.

Projects should state that reasonable accommodations will be provided both for VISTA service activities and for the interview process.

For the purposes of disability inclusion, a best practice is to state tasks upfront in service descriptions for positions that require particular abilities. For instance, “ability to serve 7–8 hours per day in an office environment” or “ability to transport yourself between community meetings during the work day” make sense for a VISTA assignment if those activities are necessary. In that vein, tasks that are not actually necessary to perform the essential functions of the service position should not be included. A declaration such as “must be able to lift up to 30 pounds” requires further consideration as to whether this stated activity is a truly necessary requirement for the indirect, capacity-building VISTA assignment.

Examples of Improper Bias or Possible Illegal Discrimination

Illegal discrimination may be subtle or may not always be very clear on the first reading. If a description causes concern, you may want to reread the sentence or seek another opinion. Examples of possible discrimination in opportunity listings include the following:

- A faith-based youth development organization stated in its opportunity listing that all participating youth and volunteers (including VISTA members) must also apply for an organization membership. Further research indicated the secondary membership required taking an oath to God
 - These requirements are possibly discriminatory based on religion. VISTA is a program that is open to otherwise eligible individuals without regard to religious affiliation or lack thereof
- A veteran VISTA project that focuses on serving impoverished veterans may not state, “Veterans encouraged to apply – must provide discharge information,” because the statement would pose a greater application burden on veterans. It may also risk revealing confidential or private information
 - Note: Veteran status may be used as a positive preference and stating alone that “veterans are encouraged to apply” is allowed
- A veteran VISTA project that focuses on serving impoverished veterans should not state, “Veterans encouraged to apply (those veterans without medical discharges only)”
 - Such a statement is potentially discriminatory against veteran VISTA applicants and candidates, based on disability. The statement may also deter veterans who were medically discharged from the U.S. Armed Forces but who are otherwise qualified to serve in the VISTA program from applying

- A community nonprofit organization states: “We do not discriminate on the basis of race, sex, disability or, in most cases, religion”
 - This statement is potentially discriminatory based on religion. Sometimes, on the first reading, possible discrimination can be easy to read past but can become clearer upon a second reading
- A project that targets a specific cultural group for services cannot use that same demographic target to filter out VISTA applicants or candidates who are not members of that specific cultural group. Thus, “bicultural preferred” may be problematic language in a listing because the language suggests a VISTA applicant or candidate’s membership in a protected group is preferred. Applying preferences based on such statuses as race or national origin is illegally discriminatory. However, a project’s consideration of an applicant or candidate’s experience with a specific cultural group is acceptable and not discriminatory
 - Here is an example of improved wording that enhances clarity and removes improper bias: “Bilingual Spanish/English speakers and individuals with *experience* working in Latino/Hispanic communities *strongly encouraged to apply.*” The key points refer to experience instead of ethnic or cultural background, encourage applicants who are a good fit, and eliminate bias statements

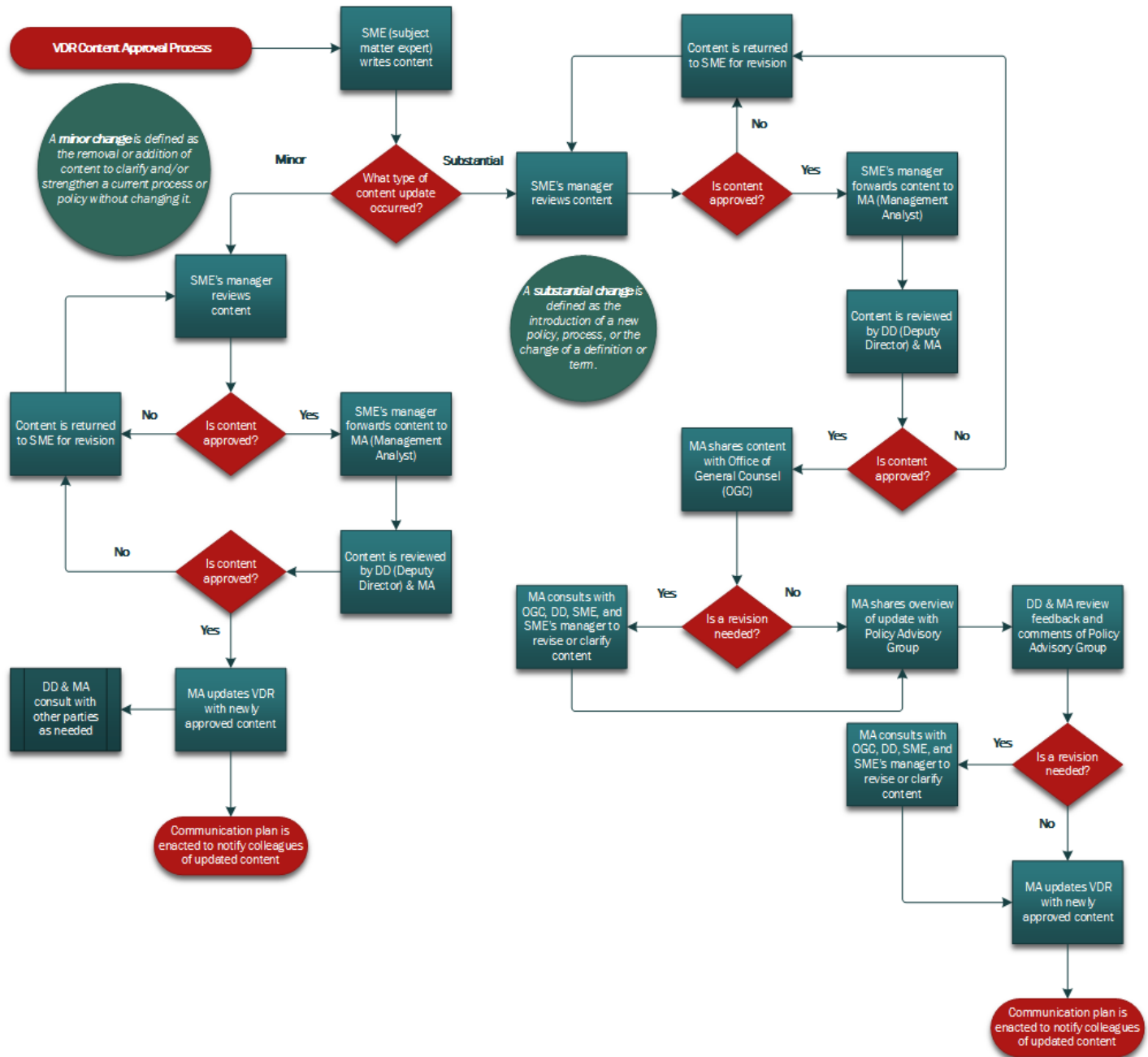
Selection of Best Practices

- Always consider the quality and persuasiveness of a listing during the review and, if appropriate, follow up with sponsor.
- Encourage sponsors to create compelling and descriptive titles for VISTA member assignments.
- Review [recruitment resources](#) (<http://www.vistacampus.org/course/view.php?id=50&page=390>) on the VISTA Campus to support development of quality listings
- Email the sponsor after you approve the opportunity listing to keep the process moving
- Encourage sponsors to check My.AmeriCorps.gov (<https://my.americorps.gov/>) and <https://www.vistacampus.gov/supervisors/recruiting?id=50&page=390> to see that the listing has gone “live.” Encourage sponsors to communicate with you directly when they make revisions to their opportunity listings
- Use the “Edit” button for all listings before approval because:
 - The “edit” screen is easier to read and best for reviewing and correcting details
 - The “edit” screen checks for certain errors and missing information
 - Editing is required for all new listings

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Appendices

Appendix 1A: VDR Content Approval Process



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Appendix 4A: MSY Practice Exercise

In November 2015, a project proposed by the ABC Organization is approved to be a VISTA project. Up to one member will serve a full year.

Member service will begin on January 1, 2016, and finish on December 31, 2016. How many MSY resources are needed to support this project?

Given

MSY allocations are made and must be used by the end of each fiscal year. The fiscal year begins on October 1 of one year and ends on September 30 of the next. For example, FY 2016 begins October 1, 2015 and ends September 30, 2016.

Analysis

To support this member, MSY resources are needed in each of two fiscal years: FY 2016 and FY 2017.

For FY 2016: The first date of service is January 1, 2016, which is three months into FY 2016. Therefore, the member is "on board" for the nine remaining months (Jan.–Sept.) in FY 2016.

Number of MSY needed in FY 2016 = 9 months/12 months or 0.75 MSY

In other words, approximately 0.75 MSY is needed to support this member in FY 2016.

For FY 2017: In addition, the member is on board for three months (Oct.–Dec.) in FY 2017.

Number of MSY needed in FY 2017 = 3 months/12 months or 0.25 MSY

In other words, approximately 0.25 MSY is needed to support this member in FY 2017.

Answer

One MSY is needed to support this member: 0.75 MSY is needed for FY 2016 and 0.25 MSY is needed for FY 2017.

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Appendix 10A: AmeriCorps VISTA Project Approval Checklist

Concept Paper Approval

In addition to answering the Concept Paper narrative questions, the proposed project:

- Fits with one or more of CNCS's strategic initiatives, demonstrated state or local community needs, or VISTA programming priorities
- Addresses the needs of a low-income community
- Ultimately ensures organizational capacity so that the project can continue once the VISTA resources are withdrawn
- Involves beneficiaries of the services provided and the low-income community in project development, implementation, and sustainability
- Has the capacity and commitment to recruit, train, supervise, and otherwise support VISTAs recruited locally and nationally
- Justifies request to be an intermediary (if applicable)
- Complies with the provisions of the Domestic Volunteer Service Act of 1973, as amended; 2009 Edward M. Kennedy Serve America Act; and VISTA regulations and policies

The applicant:

- Is a public-sector organization or a private organization designated as nonprofit by the Internal Revenue Service. (An organization that has submitted to the IRS an application for nonprofit status may be considered, but its full VISTA application cannot be approved until it is designated.)
- Has resources available (such as space, supplies, and service-related mileage reimbursement or transportation) for VISTAs to perform their activities
- Is able to adequately meet the expectations of the Memorandum of Agreement
- Has the capacity and commitment to recruit, train, supervise, and otherwise support VISTAs recruited locally and nationally
- Understands and is committed to promoting national service
- Is experienced in the issues relating to the beneficiaries of the service
- Has the capacity to build community partnerships and collaborative efforts to achieve project self-sufficiency

Full Application

In addition to answering the Application narrative questions, the proposed project:

- Continues to meet the approval criteria listed for the concept paper and provides expanded information on need and organizational capacity

- Is persuasive in relating the statement of need for the project with the Performance Measures, the VISTA assignment description, and the positive outcomes of the project
- Describes in measurable terms the anticipated self-sufficiency outcomes
- Demonstrates that the number of VISTAs being requested is appropriate for the project goals
- Links the skills qualifications for VISTAs with the project activities
- Proposes activities that will utilize the VISTA member resource for a full 12 months of service
- Demonstrates how the VISTA(s) will be introduced to the agency and community and demonstrates the plans for on-site orientation and training, as well as day-to-day supervision

Continuation

VISTA resources are available, and the project:

- Has demonstrated progress toward achieving capacity-building and self-sufficiency goals via the Project Progress Report
- Has performed well in meeting its performance measures
- Has not had significant attrition
- Has complied with provisions contained in the Memorandum of Agreement and other applicable guidelines and regulations
- Is current with its reporting requirements for the Project Progress Reports, Sponsor Verification Forms, and, if applicable, the Federal Financial Report
- If applicable, is current with paying cost-share invoices

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Appendix 10B: Sample New VISTA Project Checklist Sample from Texas CSO

Prior to Award

1. Document sponsor eligibility – get IRS form and run EIN
 - a. For intermediaries, ensure that sponsor keeps site eligibility information on file
2. For cost share projects, run GuideStar: for nonprofits, get GuideStar report and complete analysis to ensure financial stability

In eGrants/Portal

1. Review the project name to make sure that it makes sense and can be understood and linked back to the sponsor if it's the only thing that appears in a block. i.e. "Capacity Building VISTA Project" shouldn't be used but "Feeding Texas VISTA Project" should
2. Enter required information under Staff Review (see Memorandum 14-001 for instructions)
3. After awarded - Enter PPR periods and due dates in eGrants
4. Have the project director enroll in a Supervisor's Orientation

Email to State Director

1. Write up and email the program description to State Director. Information include should be agency name and address, project director, and paragraph overview of project.
2. Send the Project Director and Authorized Representative's contact details to State Director

Texas State Page

1. Have the Project Director create an account in VISTA campus and add Project Director to the Texas State Page
2. Send the Project Director Texas State Page information – review posting monthly Impact Stories
 - a. Template email is titled "State Page Introduction Email" and is in the VISTA folder.

Worksheets

1. Add new project to the tracking and PSO projections worksheets
2. Enter PPR periods and due dates in tracking spreadsheet

Appendix 16A: Step-by-Step Process of the VISTA Criminal History Check

The elements outlined below constitute the core of the criminal history check process.

First

- **CSO informs sponsor.** The CSO informs the sponsor of its role in explaining to all applicants of the requirement to undergo the National Sex Offender Public Website (NSOPW) and FBI Criminal History Check.

Summer Associates do not undergo the FBI criminal history check.

- **Sponsor informs applicants.** The sponsor is responsible for informing the applicant of the requirement to undergo a review in the National Sex Offender Public Website and for submitting fingerprints for an FBI Criminal History Check. The sponsor informs the applicant that, if s/he is recommended to the CSO, s/he will need to submit completed fingerprint cards within a stated timeframe in order for VISTA to conduct an FBI criminal history check.

The sponsor must provide the member a fingerprint kit on the first day of service.

Through the interview process, the sponsor should discuss the applicant's criminal history and ensure that criminal history has been accurately reported on the application. If the applicant's criminal history has not been fully disclosed, the sponsor must notify the CSO, which will then submit to VISTA HQ a Criminal History Justification Form (CHJF).

Second

- **CSO conducts and adjudicates NSOPW results on recommended applicants.** The CSO uses each applicant's name at the time of the sponsor's recommendation to search the National Sex Offender Public Website. See guidance provided by the VMSU for detailed instructions: [VMSU's Instructions for Processing VISTA member Actions for Corporation State Offices \(http://portal.cns.gov/Portals/0/Instructions%20for%20Processing%20VISTA%20Member%20Actions-Feb%202016.pdf\)](http://portal.cns.gov/Portals/0/Instructions%20for%20Processing%20VISTA%20Member%20Actions-Feb%202016.pdf).

If applicant's name appears on the NSOPW:

1. The CSO must verify applicant's identity on the NSOPW
2. Contact Area Manager, the VISTA CHC Team and OGC and send results to VISTA HQ, where it will be securely filed according to VISTA CHC file retention practices
3. In consultation with the above parties, deny the applicant in writing

- **CSO reviews application for criminal history.** Presuming the applicant does not appear on the NSOPW as noted above, the CSO checks the Background Questionnaire tab of the application for disclosure of criminal history.

If an applicant discloses that he/she has been convicted of a criminal offense, is currently facing criminal charges, or is on parole/probation, and the CSO nonetheless believes that the applicant is suitable to serve in VISTA, the CSO completes the Criminal History Review Justification Form (CHJF) (Appendix 16C). The CSO emails the form to the VISTA CHC Team (VISTAfingerprint@cns.gov) along with any relevant documentation, such as the full disposition of the court for each criminal case. The VISTA CHC Team will provide the final determination to accept or deny the CHJF and the member's service eligibility.

If the VISTA CHC Team accepts the CHJF:

1. The VISTA CHC Team will email approval to the CSO within 48 hours of receipt of the CHJF
2. The VISTA CHC Team will document the decision in the Portal
3. The VISTA CHC Team will file the CHJF and any additional information in a secured location and will destroy the file according to VISTA CHC file retention policies
4. The CSO accepts and enrolls the member into PSO

If the VISTA CHC Team denies the CHJF:

1. The VISTA CHC Team will email the denial rationale to the CSO, Area Manager and OGC within 48 hours of receipt of the CHJF
2. The VISTA CHC Team will document the decision in the Portal
3. CSO, Area Manager and OGC discuss denial and appeal procedures
4. CSO denies the application
5. The VISTA CHC Team will file the CHJF and any additional information in a secured location and will destroy the file according to VISTA CHC file retention policies

Third

- **Training Unit informs candidates of CHC requirements.** The CHC requirements are communicated to members in the [Guide to Entering VISTA Service](#) and during PSO.
- **Sponsor provides member with a fingerprint kit on the first day of service.**
 - The fingerprint kits include two fingerprint cards, Member Disclosure Form, Guidance, UPS label (provided by sponsor via CSO)
 - Sponsors can request fingerprint kits from the CNCS Online Ordering System: <https://pubs.nationalservice.gov/>.
 - CSOs can request UPS labels and receive assistance by emailing VISTAfingerprint@CNS.gov.

- **Member obtains fingerprints and sends two completed cards to VISTA HQ.**
 - The VISTA CHC Team records receipt and checks the quality and completion of the cards. If necessary, the VISTA CHC Team will contact member/CSO to resubmit illegible cards
 - Members will receive a \$25 fingerprint subsidy in the first living allowance
 - The VISTA CHC Team may send out periodic status reports to CSOs and a reminder to members
- **The VISTA CHC Team sends fingerprint cards to OPM.** OPM is the FBL channeler for all federal agencies. The FBI criminal history check may take up to six weeks.
 - The VISTA CHC Team records when the cards are received from the VISTA member and when they are sent to OPM.
- **OPM completes the checks and sends FBI reports to CNCS.**
 - The CNCS Office of Personnel Security receives the FBI reports from OPM and e-delivers the reports to the VISTA CHC Team.
 - The VISTA CHC Team records receipt of the FBI reports.

Fourth

- **The VISTA CHC Team reviews the FBI report, adjudicates if necessary and records member clearance status.**
 - **No criminal history:** Member is cleared to serve and clearance status is recorded in Portal.
 - **Criminal history is consistent with the information self-disclosed in application. VISTA HQ has an accepted Criminal History Justification Form and/or Member Disclosure Form:** Member is cleared to serve and clearance status is recorded in Portal.
 - **Inconclusive reports:** OPM is unable to run the check due to illegibility. The VISTA CHC Team follows up with the member to resubmit fingerprints and then informs the CSO of the results. However, if the FBI provides a name-based check, the VISTA Program will accept the check and follow adjudication protocol.
 - **Adjudication/Further Review:** If the FBI report requires further review, but not immediate termination, the VISTA CHC Team will contact the member and the CSO if it requires the CSO's follow up.
 - **Adjudication/Termination:** If information in the FBI report or information gathered after further review necessitates termination, the VISTA CHC Team informs the CSO, Area Manager and OGC.
 1. CSO initiates termination proceedings. See Ch. 26: Termination of a VISTA and Deselection of a Candidate for details and procedures
 2. The VISTA CHC Team will record the final clearance status of the member in the Portal

Appendix 16B: File Storage and Retention Summary

Only authorized CNCS personnel may have access to the FBI's criminal history reports, limited to VISTA CHC Team, VISTA leadership and OGC. FBI reports cannot and must not be shared with CNCS staff outside of HQ, including CSOs. FBI reports cannot be emailed or printed out.

VISTA does not share the results of criminal history check information with third parties, such as a sponsoring organization.

	Retained for how Long	Stored Where
Member NSOPW	Member service year	S:\VMSU\VISTA NSOPR
Denied Candidate/Early Terminated Member Criminal History Check Documentation	Until final decision on the applicant's or member's request for reconsideration	Secured location at VISTA HQ
Member FBI Reports, Criminal History Justification Form, Disclosure Form and Documentation	120 days after member successfully ends service	Secured location at VISTA HQ

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Appendix 16C: Criminal History Review Justification Form

This form documents the adjudication and determination of suitability for VISTA service. A CSO must complete this form if an individual discloses a criminal history on the application or if requested by VISTA HQ.

Instructions for CNCS State Office Staff

- **Part A:** Part A is used to present or describe the conviction(s). Copy and paste this section as needed to list multiple convictions.
- **Part B:** The State Office is required to justify why the individual should be placed in service despite the criminal history. VISTA HQ requires documentation, as soon as possible, of:
 - the full disposition of and conditions set by the court relative to any criminal case
 - letters of support
 - the CSO's assessment of the sponsor's capacity to satisfactorily supervise, and
 - the CSO's and/or sponsor's assessment of the applicant's suitability to serve given the applicant's skills and life experience where possible
- **Attach** relevant documentation, such as the disposition of the court for any criminal cases, letters of support, or statement from the individual.
 - Court documents are not required for a single minor drug or alcohol related charge unless the offense occurred within the past 365 days. If the CSO is unsure what a minor drug and alcohol conviction refers to, contact VISTAfingerprint@cns.gov.
 - Minor traffic offenses such as traffic fines and parking tickets do not require a CHJF. Traffic fines that involve the presence of drugs, alcohol, etc. require a CHJF. CSO should contract VISTAfingerprint@cns.gov if unsure whether a conviction requires a CHJF.
- **Email** the CHJF to VISTAfingerprint@cns.gov and copy your Area Manager.

Instructions for VISTA Headquarters Staff

- Review form and attachments as soon as possible and no later than 48 hours from date of receipt
- Email the CSO of the review's outcome—acceptance or denial for service
- Document the CHJF action in the Clearance tab of the Portal
- File in a secure location. See Appendix 16B for file retention policies

The Criminal History Review Justification Form is available on the following page.

Criminal History Review Justification Form

Part A.

Member Name: _____

App ID/NSPID: _____

Start Date: _____

Date of Incident: _____

Location of Incident: _____

Charge or citation: _____

Final Court Judgment

- Guilty
- Dismissed
- Diversion Program
- Not Guilty
- Deferred judgement/suspended sentence
- Other:

Current legal status:

	Is the member currently on probation of any kind?
	Does the member have any unmet financial obligations pertaining to this incident?
	Are there any court-ordered obligations relating to this incident that have not been satisfied?

If "yes" to any of the current legal status questions listed above, please state when and how current legal obligations will be met.

Part B (Optional):

Sponsor Justification for Acceptance as an AmeriCorps VISTA applicant

State the reasons the applicant is a qualified candidate despite the criminal history. It is acceptable to attach an email or statement from the sponsor in lieu of a statement below.

- Request for Approval to Serve

Required: State Office Justification for Acceptance as an AmeriCorps VISTA applicant

State the reasons the applicant is a qualified candidate despite a presence of a criminal history.

- Request for Approval to Serve

Required: VISTA HQ Acceptance will be recorded in the Clearance Tab of each member and via email to CSO.

Approval to serve is conditional and dependent on the FBI criminal history report.

Required: VISTA HQ Justification for Denial of Service will be recorded in the Clearance Tab of each member and via email to the CSO.

This form will be securely filed in a location at VISTA HQ and retained and destroyed according to VISTA CHC file retention practices.

Appendix 16D: Member Disclosure Form

This form is for VISTA members who are required to be fingerprinted. This form must be completed and returned to VISTAfingerprint@cns.gov within the stated timeframe. This form is included in the Fingerprint Kit.

Member Disclosure Form

AmeriCorps VISTA requires a criminal history check to ensure community members with whom we work are protected. We investigate past sexual offenses and other criminal offenses that have direct negative implications on your assignment. A minor offense with no relation to your assignment will generally not bar you from service.

If you did not fully disclose your criminal history in your application, please do so now.

Complete the following if you have been convicted of an offense (regardless of time), are currently facing charges, or are on probation or parole and did not list it on your application.

- Do not complete this form if you fully disclosed your criminal history on your application and/or you do not have a criminal history
- Exclude traffic fines (ex: parking tickets, speeding tickets, etc.) unless the violation was alcohol or drug related
- Fill out one form for each incident
- Please email this form to VISTAfingerprint@cns.gov no later than 30 days after your PSO state date

Failure to fully disclose your criminal history may result in termination of your service with AmeriCorps VISTA.

Name: _____

NSPID: _____

Service Start Date: _____

Date of Incident: _____

Location of Incident: _____

Charge or Citation: _____

Final Court Judgment

Guilty

Dismissed

Not Guilty

Deferred judgment/suspended sentence

Diversion Program

Other: _____

Current legal status:

Yes No

		Are you currently on probation of any kind?
		Do you have any unpaid financial obligations pertaining to this incident?
		Are there any court-ordered obligations relating to this incident that have not been satisfied?

If you answered “yes” to any of the questions above, please state when and how your legal obligations will be met.

Provide narrative explanation of the circumstances surrounding the incident:

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Appendix 16F: Clearance letter

This letter provides written documentation that VISTA HQ has cleared an individual to serve as an AmeriCorps VISTA member. This letter may not be altered, except for the fields indicated in gray. Any further alteration of this letter renders it invalid. This letter may not be used to fulfill National Service Criminal History Check requirements as detailed in 42 U.S.C. § 12645g and supplemented by regulatory requirements at 45 CFR §2540.200 through §2540.207 (updated in 2012).



VISTA
Volunteers In Service To America

AmeriCorps VISTA
250 E Street, SW
Washington, DC 20525
NationalService.gov/VISTA

Date

Name

Address

Address

Re: AmeriCorps VISTA Criminal History Check for Name of VISTA

To Whom It May Concern:

AmeriCorps VISTA members are subject to a criminal history review process in order to support the safety of service participants, project beneficiaries, and community members. The background check consists of an online search of the Dru Sjodin National Sex Offender Public website and an FBI criminal history check, which requires candidates to be fingerprinted.

This letter certifies that Name(s) of VISTA has/have met AmeriCorps VISTA's criminal history check baseline criteria for the time period **start of service date -- close of service date**. Please contact our office if you have questions.

Sincerely,

VISTA Criminal History Check Team

VISTAfingerprint@cns.gov

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Appendix 16G: Ordering Fingerprint Kits

To order fingerprint kits—which consist of a manila clasp-envelope, two blank FBI cards and VISTA Member Instructions—please follow the steps below:

- Create an account on <https://pubs.nationalservice.gov/> using your CNCS email.
 - Ensure you entered a shipping address in your account
 - You must be logged in to search for the fingerprint kits and certain other items.
- Under Search by Title/Publication ID enter the code **AM1097** and under Search By select **Publication ID**
=Or=
- Under Search by Program/Initiative, select (click on) “AmeriCorps VISTA” to find the fingerprint kits
- To ship directly to a sponsoring organization, use the “Add Address” feature on the Checkout page

The warehouse typically ships 3-days after an order is placed. It may take up to 10 business days in transit. Additionally, if you order more than 50 kits, there may be an additional delay of up to 48 hours.

***Your requests for shipping labels should continue to be submitted by email to VISTAfingerprint@cns.gov.**

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Appendix 18A-1: Responsibilities of Training Partners for Implementation of PSO and SO

Following is an overview of responsibilities for the implementation of PSO and SO. For Step-By-Step system instructions, see the Instructions for Processing VISTA Member Actions.

Prior to the Orientation

Responsibilities of VISTA Training Coordinator

- Create all events in the Portal upon completion of the training calendar
- Notify the Cluster when all events are created in the Portal
- Communicate contingency plans with CSOs if events are under or over enrolled
- Review and approve all Travel Request Profiles (TRP)
- Identify participating state staff through Area Manager three weeks prior to PSO/SO
- Conduct conference call with all participating staff including, CSO staff, Education Northwest's regional training leader (RTL), hotel representative, and AFYA onsite staff two weeks prior to event
- Clarify roles of CSO staff regarding registration and session facilitation

Responsibilities of CSO Staff (in relation to training)

- Encourage all sponsors to develop a recruitment plan that allows enough time for all VISTA candidates to be placed and enrolled in training events by the deadline for enrollment (typically 35 days prior to the start of the training)
- Ensure that project sponsors have reviewed the VISTA Assignment Description (VAD) with VISTA candidates and have informed the VISTA candidates s/he must bring it to the PSO
- Select, place, and enroll VISTA candidates in the Portal no later than the deadline for enrollment
- Run the Trainees By State report in the Portal and confirm all VISTA candidates from the state are enrolled by the deadline for enrollment
- Ensure VISTA candidates complete the Travel Request Profile (TRP) in the portal by the deadline for enrollment
- Inform sponsors to enroll all VISTA supervisors who will attend an SO in eGrants by the deadline for enrollment
- For late enrollments (i.e., supervisors or candidates not enrolled in a training by the 35-day deadline), the CSO requests instruction from the VISTA Training Coordinator
- For VISTA candidates or supervisors who cannot attend an orientation in their own cluster due to enrollment limits or timing, the CSO requests instruction from the VISTA Training Coordinator

Responsibilities of Training Contractor

- Send Information Packets to all participants 30 days prior to PSO/SO
 - VISTA candidates' packets include:
 - Letter from the AmeriCorps VISTA Director
 - Guidance to complete pre-PSO coursework and onboarding forms on the [VISTA Campus](https://www.vistacampus.gov/vista-pre-service-coursework-and-onboarding). (<https://www.vistacampus.gov/vista-pre-service-coursework-and-onboarding>).
 - Reminder of fingerprinting requirements and deadlines
 - Logistical information on how to reach the hotel, etc.
 - Supervisors' Welcome Packet includes:
 - Letter from the AmeriCorps VISTA Director
 - Overview of the orientation: purpose, methodology, and agenda
 - Logistical information on how to reach the hotel, etc.
 - Send copies to CSOs

Responsibilities of Logistical Contractor

- Arrange travel for candidates and supervisors
- Send itineraries to all participants traveling by air, train, or bus no later than one week prior to the PSO/SO
- Send copies of the itineraries to the CSOs, VMSU, and VTU

Onsite throughout PSO and SO

Responsibilities of Training Coordinator

- Oversee registration process in coordination with AFYA. Registration process consists of:
 - Sign-in (sign-in sheets, nametags, t-shirt, PSO/SO materials)
 - Travel voucher processing
 - Verification of completed on-line paperwork (W-4, Designation of Beneficiary, Life Insurance, End-of-Service Benefit Selection) and Terms and Conditions course
- Contact CSO staff in the case of 'no shows' or participant issues
- Coordinate with site staff on all logistics
- Respond to trainee questions or concerns
- Lead CNCS Staff Sessions:
 - Navigating Your Year of Service (PSO)
 - Managing Your VISTA Project (SO)
- In coordination with other on-site staff, respond to onsite emergency situations (See "Medical Emergency at PSO".)
- Intervene, coordinating with Training Contractor personnel, on issues regarding:
 - Participants without VADs

- Participants who may not be suitable for service based on observed behavior (*See “Improper Conduct at Training” earlier in this chapter.*); final decision to de-select a candidate rests with the CSO administering the project; VISTA Training Coordinator recommends de-selection to the CSO and is responsible for documenting in writing justification for not swearing-in a VISTA candidate.
 - VISTA members who are attending as training deferred VISTAs cannot be de-selected at a PSO, and must be terminated by the CSO should there be cause for such.
- Coordinate through AFYA emergency travel onsite to send candidate home as required
- Provide feedback to the Director of VISTA Training and brief written feedback report to share with Cluster

Responsibilities of VMSU Specialist

- Take the lead on processing vouchers and paperwork for candidates who relocate to serve
- Assist other staff at registration as needed by providing guidance on reimbursement calculations and answering questions
- Review vouchers and paperwork and flag those requiring follow-up
- Review all in-processing forms, and list (to post) individuals who are missing or have incomplete forms (signatures, witnesses, inaccuracies, etc.)
- Working with VISTA Training Coordinator, follow up with VISTA candidates as needed
- Respond to trainee questions or concerns
- Lead optional session on Childcare
- Organize all vouchers and paperwork; transport them back to VMSU.
- Collect signed “Swearing-In” forms after the oath has been taken and coordinate CSO staff in witnessing the forms

Responsibilities of CSO Staff

- Assist at registration as needed and as designated by the VISTA Training Coordinator. Assist with:
 - Participant sign-in
 - Collection of in-processing forms when appropriate, checking for accuracy and required signatures
 - Collection of travel vouchers, checking for accuracy and required signatures
- Support VISTA Training Coordinator during CNCS Staff Sessions:
 - Navigating Your Year of Service (PSO)
 - Managing Your VISTA Project (SO)

- Session designs, talking points, and PowerPoint presentations for these sessions have been distributed to each State Office and are available through the VISTA Training Unit at HQ, as well as onsite through the trainers
- Participate in and attend training sessions when available
- Respond to trainee questions or concerns
- Accompany ill participants to the hospital emergency room, if necessary
- Confer with VISTA Training Coordinator, Education Northwest trainers, and other CSO staff concerning improper conduct at PSO or SO
- Administer the oath
- Assist in collecting signed “Swearing-In” forms after the oath has been taken and sign as witness

Responsibilities of Logistics Coordinator

- Oversee and lead, in coordination with the VISTA Training Coordinator or VISTA representative, all aspects of the registration process
- Follow-up with late arrivals to complete registration
- Notify HQ representative to contact State Offices of ‘no-shows’
- Respond to onsite emergency situations (*see “Medical Emergency at PSO”*), in coordination with the Training Coordinator
- Arrange emergency travel onsite to send candidate home as required

Responsibilities of Training Contractor

- Lead Trainer and training staff provide PSO and SO session materials
- Coordinate with VISTA Training Coordinator or VISTA HQ Representative, AFYA and CSO staff prior to first session on logistics, roles, and session designs
- Notify VISTA Training Coordinator of any concerns relating to VISTA candidate behavior, performance or potential suitability
- Respond to CSO staff questions concerning sessions

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Appendix 18A-2: Travel Reimbursement Allowances

The following describes the travel reimbursement provided for VISTA candidates and supervisors who travel to attend training.

Travel by Common Carrier

- In rare cases, in which the traveler is required to purchase their own ticket, reimbursement is made for actual cost up to the amount of equivalent government rate fares or lowest fare the VISTA program would pay
- Travel by privately owned vehicle to and from home and train station or airport is reimbursed for direct route mileage (determined by using Google Maps) at a rate set by the VISTA program. This rate is tied to the [GSA mileage rate for relocation](http://www.gsa.gov/portal/category/21284) (<http://www.gsa.gov/portal/category/21284>)
- Reimbursement for tolls is provided for actual costs
- Reimbursement for airport and train/bus station parking is provided at the economy rate, up to \$50 total
- Receipts or verification of costs are requested in all cases; a receipt is required for each expense of \$75 or more. Examples of verification of cost include a notation of daily parking rates or similar indication of costs

Travel by Privately Owned Vehicle

- Reimbursement for direct route mileage (determined by Google Maps) at a rate set by the VISTA program. This rate is tied to the [GSA mileage rate for relocation](http://www.gsa.gov/portal/category/21284) (<http://www.gsa.gov/portal/category/21284>)
- Reimbursement for tolls and hotel parking is provided for actual costs
- Receipts or verification of costs are requested in all cases; a receipt is required for each expense of \$75 or more. Verification of cost can be a notation of toll expenses, or similar indication of costs

Relocation Travel and PSO

- VISTA candidates who relocate to their service site prior to or after attending PSO receive reimbursement for PSO travel costs based on mode of travel, as described above
- VISTA candidates who are approved to attend PSO on their way to their project site (relocation through PSO) are not eligible for reimbursement of any PSO costs (including toll costs)

- For more information regarding relocation travel and reimbursement, see Chapter 23D: Supporting Members - Travel and Service-Related Transportation

Training Subsistence

- Training Subsistence is a flat rate of \$25 to reimburse travelers for meals and incidental expenses they may have incurred while traveling to and from training
- Trainees whose travel is within a 50-mile radius or candidates who relocate through PSO do not receive training subsistence

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Appendix 18A-3: Instructions for Completing and Reviewing VISTA PSO and SO Travel Vouchers

Follow these instructions for completing PSO and SO Travel vouchers. The VMSU provides instructions for completing Relocation Travel Vouchers.

Prior to PSO and SO, the VISTA Training Coordinator:

1. Prints the PSO vouchers from the Portal and organizes them alphabetically, separating supervisors and candidates
2. Makes any notes or adjustments on the vouchers for VISTA candidates or supervisors (i.e., reimburse the equivalent of airfare) and attaches documentation to the voucher (i.e., the e-mail response from the VISTA candidate or supervisor confirming receipt of the reimbursement amount)

At PSO and SO, the on-site staff:

1. Requests individuals to verify the information at the top of the voucher for accuracy (name, phone, email, address). If the information is incorrect, it is the trainee's responsibility to correct the information on the form and in my.americorps.gov for VISTA candidates or eGrants for Supervisors.
2. Verifies the mode, points, and dates of travel. If the mode, points, or dates of travel are not correct, the voucher is flagged for follow-up. Staff follows-up with the appropriate office (VISTA Training Unit or VMSU) at a later time.
3. Explains voucher calculations, based on mode of travel, for the following:
 - a. Voucher Comments – details any limits or additions to reimbursable costs.
 - b. Mileage – VISTA candidates and supervisors are reimbursed for roundtrip mileage at the current rate set by the VISTA program. If the trainee thinks s/he drove significantly farther, the trainee may be responsible for printing and submitting an itinerary from Google Maps or another online map provider.
 - c. Training Subsistence – Covers meals the VISTA program does not provide on travel days and incidentals. Consists of a flat rate of \$25.
 - d. Baggage – Reimbursable only if approved in advance. If approved, the VISTA Training Coordinator will make a note on the voucher and a receipt must be provided by the trainee.
 - e. Other – Depending on mode of travel, this category includes tolls, parking, local transit, etc.

Detailed procedures for, and examples of, PSO vouchers will be supplied by the VISTA Training Coordinator at PSO.

Appendix 18A-4: Outcomes for VISTA PSO Sessions

Session	Outcomes <i>By the end of this session, participants will be able to:</i>
Opening Day	
Registration	<ul style="list-style-type: none"> • Successfully complete in-processing requirements • Sign for reimbursement for VISTA-travel related costs • Raise concerns or questions requiring immediate responses
CNCS Welcome and VISTA Legacy Video	<ul style="list-style-type: none"> • Describe the VISTA program and its mission in broad terms • Identify CNCS staff as program-related resources • Introduce themselves to other VISTA candidates and sponsors • Better weigh their commitment to serve in context of VISTA as a national service program
Day 1	
Navigating Your Year of Service	<ul style="list-style-type: none"> • Articulate the terms and conditions of VISTA service • Identify the range of resources available through the VISTA Campus • Access and utilize the benefits of VISTA service • Raise questions and resolve concerns about their service with the appropriate individuals
Your VISTA Development Plan, Part 1	<ul style="list-style-type: none"> • Introduce themselves and the work they'll be doing as VISTA members • Use the working agreements to ensure PSO is a supportive and productive learning experience • Begin identifying skills they have and skills they need to develop to serve effectively as VISTA members
Personal Perspectives on Poverty	<ul style="list-style-type: none"> • Articulate their perspectives on and relationship to poverty • Identify the experiences and assumptions about poverty they will bring to their service
Poverty Theories of Change	<ul style="list-style-type: none"> • Describe how VISTA members empower and build the capacity of communities to fight poverty • Discuss theories of poverty and related theories of change • Analyze how theories of change inform and influence the anti-poverty work they'll be doing as a VISTA member.
Day 2	
Getting Started with Your VAD	<ul style="list-style-type: none"> • Interpret a VISTA project plan and VISTA Assignment Description (VAD) • Articulate a vision for their year of VISTA service • Talk to their supervisors about their learning needs for the VISTA year
Communication Styles	<ul style="list-style-type: none"> • Describe communication styles and skills

and Problem Solving	<ul style="list-style-type: none"> • Begin to anticipate how their personal communication style will “match” or “clash” with others’ styles at their site • Use a simple problem-solving model/method to think about challenges and negotiate with others to solve problems in the workplace
OPTIONAL SESSION: Child Care	<ul style="list-style-type: none"> • Apply for child care support, knowing regulations and procedures
Resource Development and Fundraising	<ul style="list-style-type: none"> • Describe the importance of relationship building to fundraising • Introduce themselves as VISTA members using the “minute message” model • Make an ask for their programs
Day 3	
Volunteer Mobilization	<ul style="list-style-type: none"> • Identify the steps to develop a volunteer program • Describe general volunteering trends and their impact on volunteer programs • Write a compelling recruitment message
Your VISTA Development Plan, Part 2	<ul style="list-style-type: none"> • Describe the ups and downs of the service year (the cycle of service) • Implement a plan for getting started at their sites

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Appendix 18A-5: PSO Core Agenda

Opening Day/Night

TIME	ACTIVITY
1:30 – 6:00 pm	Check-in and Registration
5:30 – 6:30 pm	Dinner
6:30 – 8:00 pm	VISTA Large Group Welcome Facilitator Introductions, Logistics Review VISTA History and Legacy

Day 1

TIME	ACTIVITY
7:00 – 8:15 am	Breakfast
8:30 – 10:00 am	Navigating Your Year of Service
10:00 – 10:15 am	Break
10:15 – 11:45 am	Your VISTA Development Plan (part 1)
11:45 am – 12:45 pm	Lunch (Opportunity to sit by States)
12:45 – 2:30 pm	Poverty in America: Personal Perspectives
2:30 – 2:45 pm	Break
2:45 – 4:45 pm	Poverty Theories of Change
5:30 – 6:30 pm	Dinner (Opportunity to sit by Skill Areas)

Day 2

TIME	ACTIVITY
7:00 – 8:15 am	Breakfast
8:30 – 10:45 am	Getting Started with Your VAD <i>(15-minute break at 10 am)</i>
10:45 am – 12:00 pm	Workplace Communication
12:00 – 1:00 pm	Lunch
1:00 – 2:30 pm	Community Input and Engagement
2:30 – 2:45 pm	Break
2:45 – 4:30 pm	Volunteer Mobilization
5:30 – 6:30 pm	Dinner (Opportunity to sit by Issue Areas)

Day 3

TIME	ACTIVITY
7:00 – 8:15 am	Check out and breakfast
8:30 – 10:30 am	Resource Development
10:30 – 10:45 am	Break
10:45 am – 12:30 pm	Your VISTA Development Plan (part 2)
12:30 – 1:00 pm	Swearing-in Ceremony: Oath, Closing Remarks <i>Adjourn</i>
1:00 pm	<i>Pick up box lunches and depart</i>

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Appendix 18A-6: Outcomes for VISTA SO Sessions

Session	Outcomes <i>By the end of this session, participants will be able to:</i>
Registration	<ul style="list-style-type: none"> • Apply for reimbursement for VISTA-related costs • Raise concerns or questions requiring immediate responses
VISTA History & Legacy	<ul style="list-style-type: none"> • Describe the VISTA program and its mission in broad terms • Identify CNCS staff as program-related resources • Introduce themselves to candidates and other supervisors
Launch of the Learning Community	<ul style="list-style-type: none"> • Meet others in a way that underscores the importance of relationship building • Identify VISTA’s training objectives for Supervisor Orientation • Recognize the different structures of VISTA sponsoring organizations and supervisor roles
VISTA Mission — Role of the VISTA (Part 1)	<ul style="list-style-type: none"> • Recognize the role VISTA members play as capacity builders to address poverty • Recognize the scope of capacity building • Articulate specific VISTA activities that address poverty and build capacity
VISTA Mission —Role of the VISTA (Part 2)	<ul style="list-style-type: none"> • Develop or revise a VAD in eGrants • Develop a VAD Follow-up Plan to guide and coach VISTAs in understanding and implementing a VAD • Develop a plan to train subsite supervisors on writing VADs
“Who Are the VISTAs?”— VISTA Supervisor Café	<ul style="list-style-type: none"> • Describe the diversity of participants who choose to become VISTAs • Identify ways that supervisors can support a diverse population of VISTAs
Effective Member-Supervisor Relationships	<ul style="list-style-type: none"> • Describe the multiple layers and benefits of effective member-supervisor relationships • Identify and discuss various strategies supervisors can use to successfully guide, develop, supervise, and partner with VISTAs throughout a year of service
Effective Recruitment	<ul style="list-style-type: none"> • Articulate what makes a VISTA recruitment strategy effective • Utilize a word bank tool to create innovative recruitment messages • Develop a practical to-do list of marketing and targeted recruitment strategies to strengthen future recruiting efforts
Interviewing and Screening	<ul style="list-style-type: none"> • Recognize the importance of preparation for successful VISTA interviews • Identify the key components of behavioral interviews • Develop strategies for conducting behavioral interviews
Preparing the VISTAs for Community Entry	<ul style="list-style-type: none"> • Articulate the importance of VISTA members respectfully engaging with the different cultures of the community • Identify strategies to ensure that VISTA members successfully enter the different cultures of the community

	<ul style="list-style-type: none"> Describe actions supervisors can take to facilitate growing cultural awareness and effectiveness of their VISTA members
VISTA Training Continuum and Onsite Orientation and Training (OSOT)	<ul style="list-style-type: none"> Articulate the importance of Onsite Orientation and Training (OSOT) Identify different VISTA training events Distinguish between the training roles and responsibilities of the sponsoring organization and CNCS Identify effective OSOT training strategies and develop a draft OSOT

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Appendix 18A-7: SO Core Agenda

Opening Day/Night

TIME	ACTIVITY
1:00 – 2:15 pm	Supervisor Check-in and Registration
2:30 – 4:00 pm	Impacting Community, Impacting VISTAs, Impacting You
4:00 – 5:00 pm	The Role of the VISTA Supervisor
5:30 – 6:30 pm	Dinner
6:30 – 8:00 pm	VISTA Large Group Welcome Facilitator Introductions, Logistics Review VISTA History and Legacy

Day 1

TIME	ACTIVITY
7:00 – 8:15 am	Breakfast
8:30 – 9:30 am	Capacity Building – The Heart of VISTA
9:30 – 10:00 am	VISTA Assignment Descriptions (VADs)
10:00 – 10:15 am	Break
10:15 – 11:00 am	VISTA Assignment Descriptions (VADs), cont.
11:00 – 11:45 am	Managing Your VISTA Project Part 1
11:45 am – 12:45 pm	Lunch with VISTAs
12:45 – 1:30 pm	Managing Your VISTA Project Part 2
1:30 – 3:30 pm	Member Development and Support <i>(includes one fifteen minute break at 2:30)</i>
3:30 – 5:00 pm	The Art of Communicating
5:30 – 6:30 pm	Dinner <i>** (Optional movie viewing)</i>

Day 2

TIME	ACTIVITY
7:00 – 8:15 am	Breakfast
8:30 – 10:30 am	Recruitment <i>(includes one fifteen minute break~10:00-10:15)</i>
10:30 – 11:45 am	Onboarding: VISTAs and Sub-Site Supervisors
11:45 am – 12:30 pm	Lunch
12:30 – 1:00 pm	Onboarding, cont.
1:00 – 2:00 pm	Supervisor Learning Community/Closing

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Appendix 18B-1: Responsibilities of Training Partners in Implementing the PSO Blend

The following is an overview of responsibilities in implementing the PSO Blend. See Instructions for Processing VISTA Member Actions for step-by-step guidance on processing member actions in the Portal.

Pre-Service Period:

Responsibilities of Training Coordinator

- Create all PSO Blend events in the Staff Portal with a start date of the Monday beginning a pay period
- Notify the Clusters when all events are created in the Portal
- Communicate contingency plans with State Offices (CSO) if events have fewer than 30 or more than 300 enrolled
- Contact candidate (via other means) and CSO if unable to reach a candidate via e-mail (e.g., e-mail bounces back).
- Send/release candidate enrollment data to Education Northwest.
 - Education Northwest will enroll the VISTA candidates in their online classrooms prior to their first day of service.
- Respond to candidate questions and concerns as appropriate.

Responsibilities of CSO Staff

- Inform sponsors of deadlines for enrollment in face-to-face PSOs.
 - For recruitment and onboarding purposes, CSOs should share with sponsors only the deadlines for the face-to-face PSOs.
 - The PSO Blend can be a recruitment/training safety net for those candidates who were recruited too late to attend the PSO Classic and must be on-boarded with short notice.
- For candidates confirmed by the VISTA Training Unit to attend PSO Blend, communicate to sponsors the PSO Blend schedule of webinars, assignments, requirements for candidates and sponsors, and expectations of them.
 - See [VISTA Pre-Service Coursework and Onboarding \(https://www.vistacampus.gov/vista-pre-service-coursework-and-onboarding\)](https://www.vistacampus.gov/vista-pre-service-coursework-and-onboarding) page on the VISTA Campus
 - Ensure that all sponsors can adequately support their VISTAs in attending those sessions (access to a quiet space with computer, reliable internet access, and phone) and completing their assignments
- By the enrollment deadline for PSO Blend (17 days prior to the start of PSO Blend) you must:
 - Select, place, and enroll candidates in the PSO Blend
 - Generate the “PSO Master List” (view the “Program State” column) report in the Staff Portal and confirm all candidates from your state and national projects are enrolled
 - Submit NSOPR to VMSU for candidates enrolled in PSO Blend
 - For all candidates who are relocating to serve, ensure that “Y” is indicated in the placement information and that the settling-in allowance is updated by the deadline for enrollment
 - Add \$25 to the Settling-in Allowance field to compensate for candidate’s fingerprinting costs
- Alert VTU and VMSU when candidates withdraw from the program and need to be removed from the training and applicable events
- Respond to candidates’ questions or concerns as appropriate

Responsibilities of VMSU

- Create all relocation (REL) events in the Staff Portal and Travel Request Profiles (TRPs) on behalf of relocating candidates
- Enroll approved relocating candidates into the REL event associated with the cluster that the member will be serving in
- Review and approve all TRPs for relocating candidates
- Send relocating candidates an email with their approved relocation travel allowance
- Create estimated and actual financial obligation for relocation travel and send to FFMC
- Track completion of online pre-PSO work and contact candidates who are missing online forms and notify the CSOs
- Respond to candidates' questions or concerns as appropriate

Responsibilities of Site Supervisor

- Ensure the candidate has their VISTA Assignment Description (VAD) at the time of interview and selection
- Install the necessary equipment (phone, computer, internet, access to internal systems, etc.) and obtain security clearances if needed for the candidate to successfully attend PSO Blend and serve at their site
- Review PSO Blend agenda
- Set aside time for the candidate to fully participate in all aspects of PSO Blend

Responsibilities of Education Northwest

- Send welcome e-mail to candidates (Guide to Entering VISTA Service)
 - Candidates' welcome email includes:
 - Guidance to complete online forms in the member Portal and VISTA Campus
 - Information about relocation and further guidance from the VMSU
 - Logistical information on how to reach the Training Coordinator, Blend timelines, and expectations of the candidate
- Enroll candidates in their PSO Blend online course in the Moodle system based on participant data provided by VISTA, and send candidates their online classroom login info following the day one webinar.
- Provide attendance reports to VTU within 24 hours of the Launching Your VISTA Service and Accomplishing Your VISTA Assignment webinars
- Provide reports to VTU at the beginning of the second and third week of the class, and following the completion of the class, showing each candidate's progress on their assignments

Responsibilities of VISTA Candidates

- Relocate to project site prior to the beginning of PSO Blend
- Upon receiving login registration email, login to VISTA Campus to review the PSO Blend course syllabus
- Complete required on-line paperwork and coursework prior to the first day of service
 - In my.americorps.gov account:
 - Direct Deposit
 - W4
 - Designation of Beneficiary
 - Life Insurance
 - End of Service Benefit Selection
 - On VISTACampus.gov
 - Terms and Conditions Course
 - Review of VISTA Benefits page
 - Civil Rights and Responsibilities tutorial
 - Mission and Legacy Pages
 - Comprehension Check Quiz
 - Childcare Tutorial (optional)
 - Education Award Website (optional)
- Get fingerprints taken and submit them to VISTA HQ within stated timeframe.

Responsibilities of Logistics Coordinator (AFYA)

- Arrange any approved financial hardship relocation travel for candidates once all forms and online coursework are complete
- Send itineraries to financial hardship relocation travelers no later than one week prior to the candidate's approved date of relocation prior to the start date.
- Send copies of the itineraries to the CSOs and VMSU.

PSO Blend: Weeks One through Four**Week 1 – Welcome:****Responsibilities of Training Coordinator**

- Host Launching Your VISTA Service and Accomplishing Your VISTA Assignment webinars
- Inform CSO staff of 'no shows' or participant issues
- Respond to members' questions or concerns via e-mail and in the webinar sessions

Responsibilities of CSO Staff

- Ensure the sponsors and supervisors understand their roles and responsibilities
- Submit oaths to VMSU via email no later than one day after the candidate is sworn in
- Assist the VMSU in acquiring missing oaths
- Inform VMSU of anyone who decides not to swear-in
- Follow up on any candidate/member who is absent from the Blend

Responsibilities of VMSU

- Upload/post REL vouchers to each candidate's account on their first day of service and inform them to print, sign, and mail vouchers back to VMSU for processing
- Once signed REL vouchers have been returned by the candidate, VMSU to sign and send vouchers to FFMC for final review and payment
- Print and sign oaths received from CSOs, and activate candidates for service
- Complete member files
- Respond to members' questions or concerns as appropriate

Responsibilities of Site Supervisor

- Ensure candidate(s) attend the PSO Blend the first day and throughout the 4 week experience
- Attend Day One webinar with your candidate (optional)
- Collect and submit all oath forms to the CSO via email
- Implement On-Site Orientation and Training

Responsibilities of Education Northwest

- Set up and produce two webinars during the first week of service for each cohort
- Introduce facilitators, field assignments, and virtual meet-up session times/days within the online classroom
- Notify Training Coordinator of any concerns relating to candidate behavior, performance or potential suitability
- Provide VISTA HQ with a WebEx attendance report for each webinar within 24 hours

Responsibilities of VISTA Members

- Send relocation voucher to the VMSU (if applicable)
- Participate in Day One and Day Three webinar
- Recite Oath, sign Oath form, and submit it to the supervisor
- Complete initial assignments to submit at week's end (Sunday)

- Participate in On-site Orientation and Training

Week 2 – OSOT (First Virtual Meet-Up):

Responsibilities of Training Coordinator

- Respond to members' questions or concerns

Responsibilities of CSO Staff

- Respond to questions or concerns of members about VAD, OSOT, and/or Project

Responsibilities of Site Supervisor

- Implement On-Site Orientation and Training
 - Discuss VAD and develop understanding of community and organization

Responsibilities of VISTA Members

- Participate in Onsite Orientation and Training (OSOT) at project
- Ensure initial homework assignments have been submitted given on the first day of service

Responsibilities of Education Northwest

- Assist with and provide support for initial field assignments
- Facilitate first virtual meet-up with VISTA Members
- Record progress on initial assignments, along with any participant concerns, and submit to VTU

Responsibilities of VMSU

- Create final financial obligations for relocation travel and send to FFMC
- Once signed REL vouchers have been returned by the candidate, sign and send vouchers to FFMC for final review and payment

Week 3:

Responsibilities of Training Coordinator

- Inform CSO staff of participant issues
- Respond to members' questions or concerns via e-mail and in the webinar sessions

Responsibilities of CSO Staff

- Respond to members' questions or concerns

Responsibilities of Site Supervisor

- Continue On-Site Orientation and Training if appropriate
- Respond to members' questions or concerns

Responsibilities of Education Northwest

- Review mid-course assignments submitted, answer questions and provide support
- Respond to member questions or concerns

Responsibilities of VISTA Members

- Complete final assignments and submit by week's end
- Communicate with facilitators regarding any assignment issues

Week 4 – Virtual Meet-Up:

Responsibilities of Training Coordinator

- Monitor progress of members' assignments
- Review completion of the assignments and communicate any concerns to CSOs regarding member participation

Responsibilities of Education Northwest

- Review and record completion of final assignments and facilitate peer reflections
- Facilitate second virtual meet-up with VISTA Members
- Provide final progress report to VTU

Responsibilities of VISTA Members

- Attend and participate in virtual meet-up, including reflecting on peer submissions
- Ensure all assignments are completed and submitted

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Appendix 19A: Roles and Responsibilities in Implementing Leader Orientation

Prior to Orientation

Responsibilities of CSO staff

(In relation to recruitment and training)

- Guide sponsors to begin recruiting Leaders as early as possible.
- Select Leaders
- Verify that prospective Leader has attended a PSO and if not, enroll in PSO
- Complete necessary steps in the selection and placement process, including:
 - Verifying citizenship
 - Conducting criminal history check (NSOPW and FBI). See Criminal History Checks for VISTAs and Leaders for more information.

The online enrollment process is different from the PSO registration process. To enroll a Leader in a Leader Orientation:

- Place the Leader in the Leader position
- From the Leader's record, open the "Events" screen, enter the Leader Orientation event code in the box, and click "Assign to event"

Responsibilities of VISTA Training Coordinator

- Announce Leader Orientation dates, event codes, and enrollment deadlines to CSOs
- Review and approve Leader Travel Request Profiles

Responsibilities of Education Northwest

- Send Welcome Packets to all participants 30 days prior to Leader Orientation
 - Welcome Packets include:
 - Welcome letter from the facilitators
 - Checklist on preparing for Leader orientation
 - Logistical information on travel, hotel, reimbursement, etc.
 - Information on the VISTA Leader Action Learning Challenge
- Send copies to the CSOs

Responsibilities of AFYA

- Arrange travel for Leaders
- Send itineraries to all participants traveling by air, train, or bus no later than one week prior to the event
- Send copies of the itineraries to the CSOs and VMSU

On-Site During Orientation

Responsibilities of VISTA Training Coordinator

- Oversee registration process in coordination with AFYA. Registration process consists of:
 - Sign-in sheets
 - Training materials
 - Travel vouchers
 - Leader polo shirts and VISTA messenger bags

- Coordinate with site staff on all logistics
- In coordination with other on-site staff, respond to onsite emergency situations
- Coordinate through AFYA emergency travel onsite to send candidate home as required
- Contact CSO staff in the case of 'no shows' or participant issues
- Welcome Leaders and introduce training team at opening session
- Be available to meet with Leaders to answer questions, providing guidance and assistance with challenges they are facing, and provide resources and referrals for additional help
- Conduct presentation on using the Leader Campus
- Close the workshop with training team

Responsibilities of Education Northwest

- Notify Training Coordinator of any concerns relating to candidate behavior, performance or potential suitability
- Conduct training
- Evaluate workshop

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Appendix 19B: VISTA Leader Orientation Sample Agenda

Opening Evening

- 1:00 – 6:00 pm **Registration**
- 4:30 – 6:00 pm **VISTA Café: Getting to Know Your Leader Colleagues**
Dinner: Heavy hors d'oeuvres
- 6:00 – 8:00 pm **Opening Session**
Leadership Overview, Achieving Leadership Success, Leadership: Mind-Body-Spirit

Day 1

- 7:00 – 8:15 am *Breakfast*
- 8:30 – 12:00 pm **Transformational Leadership Model & VISTA Leader Roles** (*small groups*)
- 12:00 – 1:00 pm *Lunch*
- 1:00 – 2:00 pm **Communication: The Core of Leading Effectively**
- 2:00 – 3:00 pm **Conflict Management: An Approach Overview**
- 3:00 – 3:15 pm *Break*
- 3:15 – 4:45 pm **Conflict Management Practice** (*small groups*)
- 5:30 – 7:00 pm *Dinner*

Day 2

- 7:00 – 8:15 am *Breakfast*
- 8:30 – 12:00 pm **Competency-Based Workshops** (*select one*)
- Leading & Facilitating Effective Meetings
 - Leadership & Difficult Conversations
 - Promoting VISTA Project Sustainability
- 12:00 – 1:00 pm *Lunch*
- 1:00 – 3:45 pm **Competency-Based Workshops** (*select one*)
- Leading from a Distance: A Think Tank
 - Finding the Right VISTA
 - Guiding Your Members to High Achievement
- 3:50 – 5:30 pm **Open Space**
- 6:00 – 7:30 pm *Dinner*

Day 3

- 7:00 – 8:15 am *Breakfast*
- 8:45 – 9:00 am **Open Space** – Reflections and Official Closure
- 9:00 – 11:45 am **Leading with the Brain in Mind, Strengths-Based Leadership** (*small groups*)
- 11:50 – 12:15 pm **VISTA Campus and Action Learning Overview**
- 12:15 – 12:30 pm **Leadership Reflections and Closing**
- 12:30 pm *Box lunch and departure*

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Appendix 22A: Sample VISTA Leader Assignment Description

Sample VISTA Leader Assignment Description (VLAD)

Title: MentorCorps VISTA Leader
Sponsoring Organization: Waketa Community Services (WCS) Project Name: MentorCorps Project Number: 12ABCD345 Project Period: 05/04/2013 - 05/03/2014
Site Name (if applicable):
Focus Area(s) Primary: Education Secondary:
Note: <i>If your VAD is not accepted, the State Office will note the reason(s) why here.</i>

VISTA Assignment Objectives and Member Activities

Goal of the Project: To help ensure that children of incarcerated parents receive the educational, social, and emotional support they need to help them break the cycle of poverty, the MentorCorps VISTA project will build the capacity of WCS by developing a sustainable volunteer recruitment and management system for its mentoring program.

Objective of the Assignment (05/04/2013 – 8/31/2013)

Enhance VISTA project success by supporting recruitment and selection of high quality VISTAs to ensure project success.

Member Activities:

1. Review VADs for clarity, accuracy and consistency and suggest improvements
2. Research recruitment opportunities and promote position announcement through local avenues
3. Suggest process for candidate assessment and evaluation that incorporates the VAD in the process
4. Assist in screening applicants, setting up interviews and participate in interviews

Objective of the Assignment (05/04/2013 – 05/03/2014)

Develop and conduct orientation and training to equip VISTAs with knowledge and skills related to the project.

Member Activities:

1. Form a plan with supervisor for the on-site orientation and training (OSOT); gather orientation materials, draft agenda, secure presenters/facilitators, etc.; participate in the implementation
2. Evaluate and report on the OSOT to the supervisor, defining changes to be made
3. Identify learning needs of VISTAs and coordinate ongoing professional development; maintain professional development records for all VISTAs
4. Facilitate and encourage peer learning among VISTAs

Objective of the Assignment (05/04/2013 – 05/03/2014)

Enhance VISTA project and member effectiveness by facilitating the VISTA team, supporting team members in their work, and monitoring member monthly reports.

Member Activities:

1. Coordinate four projects for National Days of Service (September 11th National Day of Remembrance, Rev. Martin Luther King, Jr. National Day of Service, Cesar E. Chavez Day and AmeriCorps Week)
2. Conduct one-on-one monthly meetings with each VISTA member to review VAD goals, assess progress, address member needs, etc.
3. Assist VISTAs in clarifying problems and creating their own solutions, involving the supervisor if the VISTA cannot resolve the issue otherwise
4. Train VISTA members on the organization's reporting requirements and assist with reporting needs, escalating issues to appropriate supervisor
5. Collect monthly reports from each VISTA member, review data and summarize for project coordinator

Objective of the Assignment (05/04/2013 – 05/03/2014)

Enhance VISTA project stability and sustainability.

Member Activities:

1. Guide VISTA members in creating their own sustainability manuals to assist subsequent VISTAs with continuing project implementation
2. Archive all significant materials created and document all procedures for implementing the project, for convenient future retrieval by organization staff, future VISTAs and VISTA Leaders
3. Suggest changes to the program based on challenges and successes VISTAs have experienced
4. In collaboration with staff members, create and implement a written plan for project sustainability

Appendix 22B: Sample Peace Corps Description of Service (DOS)⁵⁹

MS 285 Attachment A
December 2008

EXAMPLE

DESCRIPTION OF PEACE CORPS SERVICE

JANE DOE

REPUBLIC OF CHAD 2005-2006

After a competitive application process stressing technical skills, motivation, adaptability, and cross-cultural understanding, Peace Corps invited Ms. Doe to serve as a TEFL teacher in the African nation of Chad.

PRE-SERVICE TRAINING

Ms. Doe began an intensive 10-week pre-service training on (ENTER ON DUTY DATE) in Darda, a small agricultural center located an hour south of the capital, N'Djamena. The program consisted of language training, technical skills training, AIDS education, and area studies training. As part of the technical training, Ms. Doe taught local village children for one week, then spent three weeks teaching at a host high school in the capital city where her technique was observed and critiqued by Chadian and American instructors.

Training program included:

- 95 hours of formal instruction in French
- 20 hours of formal instruction in Chadian Arabic
- 18 hours of area studies (the history, economics, and cultural norms of Chad)
- 60 hours of training in teaching English as a foreign language (TEFL) (methodology and preparation for the Chadian school system)
- 10 hours of AIDS education (how to incorporate within the English classroom)

Assignment

On (ENTER OATH DATE), Ms. Doe completed training and was sworn in as a Peace Corps Volunteer. She was assigned to Eré, a small village in the southern province of Mayo-Kebbé East, roughly 320 km south of N'Djamena. French is predominantly spoken there, although women and children frequently use a local language (Garap) for daily life and Chadian Arabic is widely used at the market and with merchants or visitors from other villages.

TEFL Teaching (Note: describe teaching experience with categories below. if PCV did not teach, describe primary and secondary projects instead. describe activities and impacts both qualitatively and quantitatively, as appropriate)

The local secondary school in Eré consisted of seven academic levels, the Chadian equivalents of seventh through twelfth grades, plus another year to prepare for the college entrance examination. There were roughly 800 students enrolled in the school and class sizes varied from 50 students in

⁵⁹ <http://files.peacecorps.gov/documents/MS-285-Attachment-A.pdf> (2016).

the upper levels to over 110 students in the lower levels. Ms. Doe was the only female teacher in the village and worked at the school with eleven other full-time male teachers. She was faced with the daily challenge of managing classes of 90-plus students, many of whom were unaccustomed to a female teacher, and many of whom were older than she. During her time there, Ms. Doe reported directly to the principal, Mr. Jean-Luc Tibesti, and worked on a full-time basis in formal and informal classroom settings exclusively for Chadian students. The school possessed remedial resources so Ms. Doe was responsible for material and course development, which included original lesson plans and creating visual aids. Due to the lack of books and other learning materials, students were wholly reliant upon what they copied from Ms. Doe's lessons for their English textbooks. During her service at the local school, Ms. Doe taught the following courses:

Date	Number of Months	Number of Weeks	Subject	Grade (U.S. Equivalent)	Number of Students	Hours per Week
1/12/06	4	14	TEFL	7, 8, 9	300	9 hours/wk

Language Skills

Ms. Doe has achieved an intermediate competency level in French during her service and effectively used French to communicate in her work at school, with her colleagues, Chadian counterparts, and in daily life. In addition, Ms. Doe was also able to learn basic Chadian Arabic, which she used at the marketplace and while traveling. She learned basic Garap as well, a local dialect spoken in her village, which she used in addition to Chadian Arabic to communicate simple things with Chadians in her community who possessed limited or no French skills.

SECONDARY ACTIVITIES/PROJECTS

Kindergarten

Ms. Doe collaborated in the writing of a project proposal for the construction and formation of a kindergarten in her village. Due to overcrowding, the space at the elementary school intended for a kindergarten was used as a regular classroom, leaving the youngest children with nowhere to go. After being approached by a school official, she worked with the administration of the school to design a plan for generating the funds and means necessary to open and maintain a new kindergarten.

Women's Literacy Group

Ms. Doe was working with her host mother to establish a women's literacy group for their neighborhood.

Ms. Doe completed her Peace Corps service in Chad on (ENTER COMPLETION OF SERVICE DATE).

Pursuant to section 5(f) of the Peace Corps Act 22 U.S.C 2504 (f) as amended, any former volunteer employed by the United States Government following her Peace Corps Volunteer service is entitled to have any period of satisfactory Peace Corps Volunteer service credited for purposes of retirement, seniority, reduction in force, leave and other privileges based on length of federal

government service. Peace Corps service shall not be credited toward completion of the probationary or trial period or completion of any service requirement for career appointment.

(FOR EARLY TERMINEES- OMIT THE FOLLOWING PARAGRAPH IF INELIGIBLE FOR E.O. 11103 BENEFITS.... See MS 285, para. 5.3)

This is to certify in accordance with Executive Order No. 11103 of 10 April 1963, that Jane Doe served satisfactorily as a Peace Corps Volunteer. Her service in Chad ended on April 22, 2006. She is therefore eligible to be appointed as a career-conditional employee in the competitive civil service on a non-competitive basis. This benefit under the Executive Order entitlement extends for a period of one year after termination of the Volunteer's service, except that the employing agency may extend that period for up to three years for a former Volunteer who enters military service, pursues studies at a recognized institution of higher learning, or engages in other activities that, in the view of the appointing authority, warrant extension of the period.

Country Director
Peace Corps Chad

Date

Appendix 23B-1: List of Approved Financial and In-Kind Support

Below is a list of support a sponsor may provide to VISTA members. The list is not intended to be exhaustive, nor is a sponsor required to provide any such support. Contact your cluster's program liaison with questions.

Housing

A sponsor may, at its discretion, provide support for housing for VISTA members. While there is no maximum threshold set for the amount of assistance, it should be consistent with the VISTA member's commitment to live among and at the economic level of the people served. Moreover, a sponsor's support for housing must be offered equally to all VISTA members serving at the site.

Projects, at their discretion can offer housing support to Leaders without offering the same benefit to VISTA members at the site, provided the housing support is offered to all Leaders serving with the project.

Support for housing can be provided in the form of a one-time security deposit or as monthly rent. All housing support must be paid directly to the landlord or leasing agent. A sponsor or others may not offer money directly to a VISTA to supplement the VISTA's living allowance, or to pay rent, utilities, or other costs – nor may VISTAs accept via third-party any payments for utilities or other housing costs other than for rent.

Accepting free or reduced-cost housing could possibly increase the VISTA's reportable income for tax purposes.

Relocation Assistance

1. **Additional relocation travel assistance** – Sponsors may arrange and pay for or reimburse VISTA members for the travel and shipping costs that exceed the support provided by CNCS without regard to the number of miles the VISTA member moved. Sponsors must purchase the travel or reimburse the VISTA member (member provides receipts) for such costs. Only in circumstances of reimbursement may funds may be given directly to the VISTA member. Funds may not be given directly to the VISTA under any other circumstances.
2. **Match settling-in allowance** – Sponsors may provide an additional settling-in allowance up to the settling-in allowance set by CNCS without regard to the number of miles the VISTA member moved. This support can help cover costs associated with settling into a new city that often exceed the CNCS settling-in allowance (i.e., rental/lease application fees, credit check fees, security deposit, first and last month rent, deposits to turn on gas and utilities, etc.). Sponsors must pay the funds directly to the landlord/leasing agent, utility company, etc., or reimburse the VISTA member (member provides receipts) for such costs. Only in circumstances of reimbursement may funds may be given directly to the VISTA member. Funds may not be given directly to the VISTA under any other circumstances.

3. **Donated furniture, appliances, equipment** – Sponsors may give donated or used items to VISTAs to furnish their homes.

Transportation

Sponsors may provide transportation support. Sponsors who receive a VISTA Support Grant or Program Grant must track transportation to differentiate service-related transportation from personal travel. Grants funds may be used to support service-related transportation and travel. Grant funds cannot be used for a VISTA member's commute or personal travel. These records are subject to audit during compliance visits.

1. **Parking permits/passes** – Sponsors may pay parking permit/pass fees associated with a service site (e.g., a permit to park at the service site), without regard to whether the same support is provided to all staff.
2. **Public transit pass** – If public transit is required for service-related transportation or travel, sponsors may provide a monthly/annual public transit pass in lieu of reimbursing the VISTA member for actual transit costs.

Sponsors may provide VISTAs with transit passes to offset the costs of commuting provided they use sponsor funds.

3. **Mileage and gas gift cards for use of privately owned vehicle (POV)** – Sponsors may reimburse VISTA members at a mileage rate established by the sponsor for VISTAs who use a POV for service-related transportation or travel. VISTAs may not receive gas gift cards in lieu of reimbursement.

Sponsors may provide VISTAs with gas gift cards to offset the costs of commuting provided they use sponsor funds.

Food

1. **Meal plans associated with housing or free access to the sponsor's cafeteria** – Sponsors may provide meal plans associated with housing or free access to their cafeteria.
2. **Grocery card** – Sponsors may provide grocery-store gift cards to VISTA members without regard to whether it is provided to all staff.

Support Services

1. **Client support services** – Sponsors may allow VISTA members access to support programs that their organization administers and that are available to the public. VISTA members must follow the same objective criteria, qualification guidelines, and other processes that members of the public follow, without exception. VISTAs must not be involved in the administration or processing of any of these programs. In reviewing a VISTA's application for such assistance or services, the sponsoring organization must adhere to its policies and processes for awarding such services. The VISTA member's involvement must not present concerns that a reasonable person would perceive favoritism or a conflict of interest on behalf of the parties involved. For example, if a VISTA wants to apply to receive food from the food bank where she serves, she is subject to the same eligibility criteria and processes (application review, wait times, level of food

distribution) as the public (e.g., a VISTA cannot receive preference to “jump the queue” for benefits). CNCS is never involved in a VISTA’s receipt or denial of such assistance or services.

2. **Employee benefit programs (health, dental, employee assistance program)** - Sponsors may provide VISTA members access to benefits available to employees. The sponsor must not define the member as an employee for the purpose of enrolling the member in such benefit programs.
3. **Emergency assistance** – Sponsors may assist VISTAs members who experience emergency situations that fall outside the VISTA program’s standard emergency support (e.g., illness of a service animal, flair up of a medical condition not covered by the VISTA health care plan). This assistance is allowable when it does not present concerns that a reasonable person would perceive favoritism or a conflict of interest on behalf of the parties involved.

Other

1. **Access to sponsor-managed facilities** – Sponsors may allow VISTA members to access their gymnasium, recreational facilities, library, or computer labs without regard to whether all staff is granted the same privileges. Sponsors may also assist members with accessing local centers that provide similar services.
2. **Birthday, holiday and other special occasion gifts** – Sponsors may provide gifts provided they do not exceed existing employee or community volunteer appreciation gifts.
3. **Career and education support** – In keeping with the VISTA program’s commitment to provide educational and professional development, sponsors may provide support with regards to attending professional conferences and classes—payment of conference fees, travel, lodging and meals or per diem that applies to standard employees. A VISTA’s participation in such conferences and classes must not interfere with VISTA service hours or performing VISTA service. Discounting or paying educational costs are also allowable where a mechanism is in place to pay the cost directly to schools or lenders or receipts exist to ensure that such payments are made on behalf of the VISTA. For full details regarding VISTAs taking educational courses during their service year, see the [VISTA Policy Allowing Members to Take Educational Classes while Serving](#).
4. **Fingerprinting costs** – Sponsors may reimburse members for fingerprinting costs incurred beyond the \$25 subsidy.

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Appendix 23C-1: FMLA Eligibility and Compliance

Who is eligible to take FMLA leave?

VISTA members, including Leaders, are eligible for FMLA leave, if they satisfy all four of these conditions:

1. Have successfully completed a full year (12 months) of service
2. Serve with the same sponsor⁶⁰ for a subsequent term of service
3. Were in ‘active status’ and assigned to the same sponsor for at least 1,250 hours (eight months) for the immediate previous term of service
4. Serve with a sponsor⁶¹ that has 50 or more employees

Given these four baseline requirements for FMLA eligibility, only a minority of VISTAs meet the eligibility requirements for FMLA leave.

FMLA eligibility is determined on a case-by-case basis. CSOs, in coordination with VISTA HQ, must contact and consult with the Office of General Counsel concerning questions on FMLA eligibility.

For what reasons may a “FMLA eligible” VISTA take FMLA leave?

VISTAs eligible for FMLA may take up to 12 weeks of unpaid (FMLA) leave each year for the following family and medical reasons:

- Birth and care of a newborn child of a VISTA
- Placement of a child for adoption or foster care with a VISTA
- Care for an immediate family member (spouse, child, or parent) who has a serious health condition
 - If the immediate family member is a covered armed service member, the VISTA may be eligible for an additional 14 weeks of leave
- Inability of the VISTA member to serve because of a serious health condition
- Qualifying circumstances that arise when the VISTA’s spouse, son, daughter, or parent is on covered active duty or has been notified of an impending call or order to covered active duty.

In all cases, the member must submit documentation to the CSO verifying the family or medical reason for taking FMLA leave. See Chapter 26 Termination of a VISTA and Deselection of a VISTA Candidate and Policy [12-003: Documentation of Member Early Terminations for Compelling Personal Circumstances](http://portal.cns.gov/Portals/0/AmeriCorpsVista/Policies/12_003%20Early%20Termination%20for%20PC%20Documentation_082012.pdf) (http://portal.cns.gov/Portals/0/AmeriCorpsVista/Policies/12_003%20Early%20Termination%20for%20PC%20Documentation_082012.pdf) for a list of acceptable documentation.

CSOs, in coordination with VISTA HQ, must contact and consult with the Office of General Counsel before approving any VISTA for FMLA leave.

⁶⁰ For the purpose of FMLA eligibility criterion 2, “sponsor” refers to the legal entity that hosts the project; a VISTA meets this criterion if the VISTA previously served with any project site or subrecipient under this sponsor.

⁶¹ For the purpose of FMLA eligibility criterion 4, the basis for 50 or more employees is the aggregate number of employees at the service site and any other offices managed or administered by the sponsor (e.g., other service sites).

How does FMLA leave apply to VISTAs who are armed service members or VISTAs with family members in the armed services?

The military family provisions of FMLA entitle eligible VISTA members to take FMLA leave for any “qualifying exigency” (urgent circumstance) arising from foreign deployment. “Qualifying exigencies” include making alternative child care arrangements for a child of the deployed military member, attending certain military ceremonies and briefings, or making financial or legal arrangements to address the military member’s absence. See the [Department of Labor’s Fact Sheet 28m\(c\)](https://www.dol.gov/whd/regs/compliance/whdfs28mc.pdf) (<https://www.dol.gov/whd/regs/compliance/whdfs28mc.pdf>) for more details and consult with OGC on specifics.

FMLA further entitles eligible VISTA members to take an additional 14 weeks of FMLA leave to care for a member of the Armed Forces who is the VISTA member’s spouse, child, or parent. See the [Department of Labor’s Fact Sheet 28m\(b\)](https://www.dol.gov/whd/regs/compliance/whdfs28mb.pdf) (<https://www.dol.gov/whd/regs/compliance/whdfs28mb.pdf>) for more detail, including definitions for “covered service member” and qualifying medical conditions.

What happens to a VISTA’s status, benefits, and allowances while on FMLA leave?

An FMLA-eligible VISTA who takes FMLA leave retains his/her status as a VISTA while on FMLA leave. Similar to instances when paid leave (personal or medical leave) is taken by a VISTA, CNCS records reflect that the VISTA remains assigned to the project where the VISTA had most recently served. The VISTA is put on Administrative Hold status during the time of FMLA leave.

Member benefits and allowances (living allowance, life insurance, childcare, etc.) are suspended (do not continue to accrue) while an eligible VISTA takes FMLA leave. However, health coverage continues, and all legal, political, religious, and other restrictions discussed in the [AmeriCorps VISTA Member Handbook](https://www.vistacampus.gov/lessons/vista-member-handbook) (<https://www.vistacampus.gov/lessons/vista-member-handbook>) remain in effect. Also while on FMLA leave, the VISTA’s accrual of a post service award (i.e., either an Education Award or a lump-sum stipend) is suspended.

If the VISTA opted to receive life insurance, the CSO must notify the VISTA that s/he is responsible for submitting a check to VISTA HQ to cover the biweekly insurance premium (\$2.04). VISTA HQ forwards the premium to the life insurance company. When the VISTA returns to service, life insurance payments will automatically resume and will be deducted from the VISTA’s biweekly living allowance.

What is the process for putting a member in Administrative Hold Status due to FMLA?

When a VISTA is determined eligible for and approved to take FMLA leave, the CSO must submit an Administrative Hold Form to the VISTA Member Support Unit (VMSU), citing FMLA as the reason for hold.

If the VISTA returns to his/her service site at the end of FMLA leave, the CSO submits a Removal of Administrative Hold Form to the VMSU and alerts the VMSU that FMLA is the reason for reinstatement.

What communications does the VISTA member receive while on FMLA leave?

The VISTA receives emails at the following intervals:

- An automated email at the start of FMLA leave notifying the member of approval for FMLA leave and detailing the conditions of leave (benefits, etc.)
- An email from the CSO five days prior to the end of the FMLA leave (approximately week 10 of 12) notifying the member that his or her FMLA leave period is about to expire and to contact the CSO to set up a plan for return.

May a VISTA's term of service be extended if the VISTA takes FMLA leave?

FMLA leave pauses the VISTA's term of service. If the FMLA leave taken by a VISTA would result in the VISTA's being unable to complete the requirements of the term of service, then the VISTA may elect one of three options:

1. Serve an extended term of service for the same amount of time as the FMLA leave taken and receive the full end-of-service award
2. Elect to end service at the previously scheduled year-long term of service end date and receive a prorated end-of-service award, based on a compelling personal circumstance
3. End service prior to the previously scheduled year-long term of service end date and receive a prorated end-of-service award, based on a compelling personal circumstance.

If the member elects to end service early and receives a prorated end of service award, based on a compelling personal circumstance, the member must submit documentation to the CSO verifying the family or medical reason. See Chapter 26: Termination of a VISTA and Deselection of a VISTA Candidate and Policy 12-003: Documentation of Member Early Terminations for Compelling Personal Circumstances⁶² for a list of acceptable documentation. (Documentation will not be required once upgrades to the staff Portal allow for tracking of FMLA.)

How does FMLA leave affect other types of leave?

A VISTA who is eligible to receive FMLA leave does not need to exhaust all paid leave (e.g., medical and personal leave) prior to taking FMLA (unpaid) leave. If an eligible VISTA invokes his/her FMLA entitlement, the VISTA must immediately notify the sponsor/supervisor and the CSO. The CSO must consult with VISTA HQ and General Counsel to verify the VISTA's eligibility to invoke his/her FMLA entitlement.

Upon return from FMLA leave, the VISTA must be returned to the same VISTA position.

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⁶² [Policy 12-003: Documentation of Member Early Terminations for Compelling Personal Circumstances](#)

Appendix 23E-1: Claim Procedures

Claim Procedures

VISTAs who are injured or experience an emergency illness related to their assignment must immediately notify the project supervisor and the CNCS State Office. The CSO then provides the VISTA with either of the following forms to complete and return to the CSO:

- [Form CA-1, Notice of Traumatic Injury](#), which is filed with the OWCP when an accident or physical injury occurs during performance of duties.
- [Form CA-2, Notice of Occupational Disease or Illness](#), which is filed with the OWCP when a disease or illness is suspected of being caused by job performance.

Although an illness or injury may not appear to be serious enough to result in compensation eligibility, VISTAs should complete the claim forms to protect their rights in case future complications develop. VISTAs have up to three years from the date of injury or up to three years from the date they realize their assignment caused an injury to request their completed form be filed with OWCP.

Submitting the Claim

1. Some of the information requested on the CA-1 Form is not relevant to VISTAs and, therefore, does not need to be completed. Required information includes the following:
 - a. Employee data
 - b. Description of injury
 - c. Employee signature
 - d. Supervisor's report (only information known by the supervisor; if supervisor does not know, leave this section blank)
 - e. Line 32-- Name and address of physician. This information is required; if physician information is not listed, the claim is not processed.
 - f. Signature of Supervisor (The project or the State Office can sign for the supervisor.)
2. The CA-1 Form must include the following attachments:
 - a. The VISTA must provide a copy of the original claim from the Doctor's office or the hospital, verifying the injury that required medical attention. If the medical documentation is not received, VISTA HQ will send the claim to OWCP, it will not be approved, and the VISTA will be notified. The VISTA has 30 days to provide this information. If the requested information is not received in 30 days, OWCP will deny the claim.
3. Once the VISTA Program submits the claim to OWCP, all communication hereafter is between the OWCP and the VISTA.
4. The CA-1 or CA-2 form first goes to the State Office, which sends it to the worker's compensation administrator in VISTA HQ. The VISTA HQ administrator verifies the service dates of the member and forwards the form to OWCP.

While a VISTA is in service, all claims, even for injuries and illnesses for which a worker's compensation claim has been submitted, are sent to the AmeriCorps Health Benefits administrator (currently Seven Corners, Inc.).

After the VISTA's service, all claims will be sent to OWCP.

Filing a claim for worker's compensation is not common, and neither the VISTA nor the State Office official can be expected to remember all of the steps or how the claim process works. The State Office should feel free to contact the VISTA HQ worker's compensation administrator as necessary at the following address:

AmeriCorps Health Benefits Office
Corporation for National & Community Service
250 E St, SW
Washington, DC 20525

For questions concerning the CNCS policies, call Craig Kinnear, the administrator of worker's compensation, at 202-606-6708.

[Chapter 8](#) of the *AmeriCorps VISTA Member Handbook* outlines the employees' compensation procedures.

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Appendix 23E-2: VISTA Providing Assistance in a Natural Disaster

When natural disasters occur, such as Hurricane Katrina, some sponsors send requests to the CSO to allow VISTAs placed at their site to participate in the disaster relief efforts.

While the CSO may approve short-term response and relief efforts of a direct service nature, the overall effort of the project should continue to focus on sustainable activities.

For changes in the focus of a project to disaster response, the CSO may allow amendments to project applications, such as new project plans with performance measures focusing on long-term recovery efforts. The amendments would include any VISTAs or support dollars approved by the CSO. The CSO sends a letter to the governor regarding the changes in the project. One letter could reference multiple new projects.

In emergency situations, the Area Manager can allow training deferments to bring individuals into service to assist in the relief effort. The CSO must make the individuals fully aware of the requirements of the VISTA program, including the twelve-month term of service and all the terms, conditions, and benefits of service. The individuals must attend a PSO in the next available training window.

CNCS has a mechanism, a CNCS Disaster Response Cooperative Agreement, to enable interested CNCS-sponsored programs to participate in disaster response deployments with FEMA or another agency and be eligible to be reimbursed through CNCS for expenses related to the disaster deployment. The Agreement is the legal instrument that must be in place to allow programs to be reimbursed by CNCS for expenses incurred by the response.

If a sponsor does not have a CNCS Disaster Response Cooperative Agreement in place but wishes to have one, the sponsor may submit a proposal at any time to the Office of Emergency Management in CNCS headquarters. Following execution of the Cooperative Agreement, the sponsor may be contacted for deployment. The sponsor contacts the CSO (and, for multi-state projects, any host state) to receive programmatic consent.

In order to best deal with future disasters, it is recommended that sponsors be asked to consider submitting Cooperative Agreement proposals in advance.

If a sponsor does not have a CNCS Disaster Response Cooperative Agreement in place, it is appropriate, with CSO prior approval, to participate in disaster response. Sponsors may contact their local Red Cross chapters or other relief organizations to explore those opportunities. The sponsors also contact their State Office to request programmatic approval. Expenses cannot be reimbursed.

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Appendix 25A: Education Award Examples

Example 1

An individual served as a VISTA Summer Associate in 2011, a VISTA in 2012, and plans to serve a third, VISTA term in 2013.

Term	Term served	Amount of award earned	Amount of a full-time award in fiscal year	Value of education award(s) earned
2	VISTA	\$5,550	\$5,550	1.00
1	Summer Associate	\$1,174.60 (prorated)	\$5,550	0.21
TOTAL				1.21

The VISTA has already earned 1.21 full-time Education Awards. An AmeriCorps member cannot earn more than the aggregate value of 2.00 full-time Education Awards in a lifetime; therefore, upon successful completion of the VISTA's third term in 2013, the VISTA will only be able to earn a fraction of the value an Education Award, i.e., an additional 0.79 of the Education Award for the fiscal year in which the VISTA will serve (FY 2014). The VISTA may alternatively elect to receive an end-of-service stipend in lieu of the partial Education Award that is also based on 0.79 (79%) of the value of one full-time Education Award.

Term	Term served	Value of Education Award(s) that can still be earned	Amount of a full-time award in fiscal year	Amount of award that can be earned
3	VISTA	0.79	\$5,645	\$4,459.55

Example 2

A VISTA served a full term in 2011, a part-time term in 2012 through AmeriCorps State and National, and also received a prorated Education Award for a partially completed term as a VISTA in 2013 (having left for a compelling, personal circumstance).

Term	Term served	Amount of award earned	Amount of a full-time award in fiscal year	Value of award received
3	VISTA (partially completed term)	\$1,665 (prorated)	\$5,550	0.30
2	State/National (part-time term)	\$2,775	\$5,550	0.50

1	VISTA (full term)	\$5,550	\$5,550	1.00
TOTAL				1.80

This individual was able to earn, thus far, three Education Awards because the total value of the Education Awards she received did not exceed the aggregate value of two (2.00) full-time Education Awards.

If this individual wishes to serve another full term in VISTA in 2014, and the appropriate Area Manager approves additional service terms for this member, this person may serve a fourth service term (third term in VISTA) and, upon successful completion of the entire term, receive an Education Award not to exceed the value of 0.20 of a full-time Education Award in the fiscal year she serves. Alternatively, the individual may elect to receive an end-of-service stipend in lieu of the (partial) Education Award that is 0.20 (20%) of the value of one full Education Award.

If this individual wishes to serve another full term in VISTA in 2014, but leaves early for a compelling, personal circumstance, the VISTA would receive a prorated Education Award based on the time served. The prorated amount would be half of what she would have earned had she completed her entire term of service. For example, if the VISTA served in FY 2014 and was scheduled to receive 0.20 of the \$5,645 award (\$1129) as discussed above, and left half way through her term, she would receive half of the scheduled award — a partial Education Award that is 0.10 (at a dollar amount of \$564.50). Alternatively, if prior to early departure, the individual elects to receive an end-of-service stipend in lieu of an Education Award, she would receive an end-of-service stipend of \$750, which is half of the amount she would have received had she completed the entire term of service.

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Appendix 26: Termination Templates

Downloadable documents are available via VISTA SharePoint

26A: Placement of VISTA on Administrative Hold Only

26B: For Cause Termination

- 26B-1: Sponsor Notification – Removal of VISTA from Project
- 26B-2: Proposed Early Termination “For Cause”
- 26B-3: Final Early Termination “For Cause” – VISTA Does Not Respond to Proposed Termination
- 26B-4: Final Early Termination “For Cause” – VISTA Responded to Proposed Termination

26C: Medical Termination

- 26C-1: Sponsor Notification – Removal of VISTA from Project
- 26C-2: Early Termination – Medical Termination

26D: Reassignment/Termination for Lack of Suitable Assignment

- 26D-1: Sponsor Notification – Removal of VISTA from Project
- 26D-2: Proposed Early Termination – Opportunity to Secure Reassignment
- 26D-3: Final Early Termination for “Non-Cause” – Lack of Suitable Assignment
- 26D-4: Notice of Project Closure – Opportunity to Secure Reassignment
- 26D-5: Final Early Termination for “Non-Cause” – Project Closure

26E: Deselection

26F: Confirmation of VISTA Resignation

26G: For Cause (Failure to submit fingerprints)

- 26G-1: Proposed Early Termination “For Cause” (Failure to submit fingerprints)
- 26G-2: Administrative Hold Removal; Conclusion of Termination for Cause Proceedings (Failure to submit fingerprints)
- 26G-3: Final Early Termination “For Cause” (Failure to submit fingerprints) VISTA Does Not Responded to Proposed Termination
- 26G-4: Final Early Termination “For Cause” (Failure to submit fingerprints) VISTA Responded to Proposed Termination

26H: VISTA Summer Associate Termination Letters

- 26H-1: Sponsor Notification – Removal of Summer Associate VISTA from Project
- 26H-2: VISTA Summer Associate Proposed Early Termination “For Cause”
- 26H-3: Final Early Termination “For Cause” – Summer Associate VISTA Does Not Respond to Proposed Termination
- 26H-4: Final Early Termination “For Cause” – Summer Associate VISTA Responded to Proposed Termination

TEMPLATE 26A: PLACEMENT OF VISTA ON ADMINISTRATIVE HOLD ONLY
(NO OTHER ACTION YET)

This letter informs the VISTA that the CSO has placed him/her in Administrative Hold status for a period of no more than 30 days. This is a "placeholder" letter to maintain the VISTA in a status in the VISTA program while the CSO takes needed time to assess the next appropriate steps, for example, issuing a proposed termination for cause letter, or issuing a letter to the VISTA offering him/her the opportunity seek a reassignment. This letter may also be used when multiple VISTAs from one project are all removed at the same time, and the CSO needs some time to determine the appropriate next steps with regard to each VISTA's participation in the VISTA program.

Replace all boldface and capitalized text in brackets with appropriate data and remove formatting and brackets.

VIA EMAIL AND VIA OVERNIGHT MAIL

[DATE]

[NAME OF VISTA]
[ADDRESS]

Re: Your Placement on Administrative Hold

Dear **[Mr./Ms. NAME OF VISTA]**:

Effective **[TODAY/DATE]**, my office, the **[STATE]** State Office, has removed you from the **[SPONSOR/PROJECT]** and placed you in Administrative Hold status for a period not to exceed 30 days. While on Administrative Hold, you will continue to receive regular living allowances.

Further, you may not report to the **[SPONSOR/PROJECT]** where you have most recently served, nor may you work on any project-related activities. All legal, political, religious, and other restrictions that are explained in the *AmeriCorps VISTA Member Handbook* remain in effect.

My office will get back to you shortly with regard to your continued status and participation in the AmeriCorps VISTA program. In the meantime, please contact me should you have any questions at **[PHONE]** or at **[E-MAIL]**.

Sincerely,

[NAME], [STATE] Program Director

TEMPLATE 26B-1: SPONSOR NOTIFICATION – REMOVAL OF VISTA FROM PROJECT (“FOR CAUSE” TERMINATION PROCESS)

This letter serves as a record, and confirms for the sponsor where the VISTA had most recently been serving, that the CSO has removed the VISTA from the sponsor’s project. Also, this letter lets the sponsor know that the CSO may be back in touch to get additional information about the circumstances leading to the removal, which may aid the CSO in determining whether it is appropriate to provide the VISTA an opportunity for reassignment or it is appropriate to propose the VISTA’s termination for cause.

Replace all boldface and capitalized text in brackets with appropriate data and remove formatting and brackets.

VIA EMAIL AND OVERNIGHT MAIL

[DATE]

[NAME OF VISTA SUPERVISOR]
[SPONSOR ADDRESS]

Re: **[NAME OF VISTA]** – Removal from **[NAME OF SPONSOR]**/Placement on Administrative Hold

Dear **[Mr./Ms. NAME OF VISTA SUPERVISOR]**:

Effective **[TODAY/DATE]**, my office, the **[STATE]** State Office, has removed **[NAME OF VISTA]** from AmeriCorps VISTA service at your organization, the **[SPONSOR/PROJECT]**, and placed **[him/her]** in Administrative Hold status for a period not to exceed 30 days.

[NAME OF VISTA] has been advised that while on Administrative Hold **[he/she]** may not report to the **[SPONSOR/PROJECT]**, nor may **[he/she]** work on any project-related activities. All legal, political, religious, and other restrictions that are explained in the *AmeriCorps VISTA Member Handbook* remain in effect.

My office will get back to you if we require any further information regarding the circumstances leading to **[NAME OF VISTA]**’s removal from **[SPONSOR/PROJECT]**. Please contact me should you have any questions at **[PHONE]** or at **[E-MAIL]**.

Sincerely,

[NAME], [STATE] Program Director

TEMPLATE 26B-2: PROPOSED EARLY TERMINATION “FOR CAUSE” (CONDUCT AND/OR PERFORMANCE PROBLEMS)

This is the initial letter sent to the VISTA after the CSO determines it is necessary to propose to terminate the VISTA. This letter also sets forth the known reasons related to the VISTA’s alleged conduct and/or performance problems that warrant initiation of early termination “for cause” under 45 CFR § 2556.400.

Replace all boldface and capitalized text in brackets with appropriate data and remove formatting and brackets.

VIA EMAIL AND VIA OVERNIGHT MAIL

[DATE]

[NAME OF VISTA PROPOSED FOR TERMINATION]
[ADDRESS]

Re: Notice of Your Proposed Termination from the AmeriCorps VISTA
Program

Dear **[Mr./Ms. NAME OF VISTA]**:

On **[DATE]**, your AmeriCorps VISTA sponsor **[NAME OF SPONSOR]**, wrote this office requesting your removal from the project. On **[DATE]**, I granted **[NAME OF SPONSOR]**’s request.

You had been assigned to serve at **[NAME OF PROJECT]** since **[DATE]**. Based on information provided by **[NAME OF SPONSOR]**, there is credible evidence that **[LIST AS MANY REASONS, AS APPLICABLE]**:

- 1) You have failed to _____;
- 2) You _____; and
- 3) You _____.

After a careful review of the facts and circumstances, grounds for your termination exist. I am proposing your termination for cause from service as an AmeriCorps VISTA member, in accordance with 45 CFR § 2556.400 (___), (___), and (___) **[CITE APPROPRIATE GROUND(S) FROM 45 CFR § 2556.400; for example, insert (6) for misconduct. See “Early Termination for Cause” section in this chapter for the list of citation references.]**.

You have the opportunity to resign in lieu of the continuation of these termination proceedings. If you choose to resign, you must do so in writing. As **[STATE]** State Program Director, I must receive your written resignation by **[INSERT 13-15 CALENDAR DAYS]**

FROM DATE OF THIS LETTER]. You may fax or e-mail your resignation to me at fax: **[FAX NUMBER]**, e-mail: **[DOMAIN]@cns.gov**.

If you do not choose to resign, this letter serves to notify you of my intent to terminate you from AmeriCorps VISTA service on or after **[INSERT THE NEXT WORK DAY AFTER 13-15 CALENDAR DAYS FROM DATE OF THIS LETTER]**. However, you have the right to respond to this proposed termination. If you choose to respond, you have until **[INSERT THE NEXT WORK DAY AFTER 13-15 CALENDAR DAYS FROM DATE OF THIS LETTER]** for the **[STATE]** State Office to receive your written answer at the Corporation for National & Community Service, **[STATE]** State Office, **[INSERT ADDRESS]** fax: **[FAX NUMBER]**; e-mail: **[DOMAIN]@cns.gov**. This letter should include the reasons you disagree with my proposed decision and any relevant affidavits or written material to show why you should not be terminated from AmeriCorps VISTA.

Effective **[TODAY OR EARLIER DATE AS APPROPRIATE]**, you **[HAVE BEEN/WERE]** placed in Administrative Hold status. You currently remain in Administrative Hold status. While on Administrative Hold, you will continue to receive regular living allowances while in that status. You will remain in Administrative Hold status either until you resign or pending the outcome of these termination proceedings. If you resign or are terminated, your Administrative Hold status will be lifted and you will cease to receive a living allowance. Moreover, if you resign or are terminated, you will not receive an end-of-service award (*i.e.*, Education Award or post-service stipend). Further, during these proceedings, you may not report to the **[SPONSOR'S NAME OR SITE, AS APPROPRIATE]** project site for service, or work on any project-related activities. All legal, political, religious, and other restrictions that are explained in the *AmeriCorps VISTA Member Handbook* remain in effect. If your termination is reversed, any allowances lost during this period will be paid retroactively.

If you fail to respond to this proposed termination, in writing, to me by **[INSERT 13-15 CALENDAR DAYS FROM DATE OF THIS LETTER]**, and you do not resign by then, I will have no alternative but to terminate your AmeriCorps VISTA service on or after **[INSERT THE NEXT WORK DAY AFTER 13-15 CALENDAR DAYS FROM DATE OF THIS LETTER]**.

The procedure for termination for cause is found in 45 CFR § 2556.400. Please contact me at **[PHONE NUMBER]** or at **[EMAIL]** if you have any questions.

Sincerely,

[NAME]
State Program Director, **[STATE]**

TEMPLATE 26B-3: FINAL EARLY TERMINATION “FOR CAUSE” (CONDUCT AND/OR PERFORMANCE PROBLEMS) VISTA DOES NOT RESPOND TO PROPOSED TERMINATION

This letter is issued only after the CSO: (1) sends the proposed (initial) letter to the VISTA; (2) allows the VISTA an opportunity to respond; (3) the VISTA HAS NOT responded AT ALL during the response period, and the CSO and the Area Manager still believe termination for cause is warranted. This letter is issued after the CSO has investigated the matter, reviewed all relevant material it gathered or received from the sponsor and the VISTA, and believe that such early termination for cause (conduct and/or performance problems) is warranted under 45 CFR § 2556.400.

Replace all boldface and capitalized text in brackets with appropriate data and remove formatting and brackets.

VIA EMAIL AND VIA OVERNIGHT MAIL

[DATE]

[NAME OF VISTA PROPOSED FOR TERMINATION]

[ADDRESS]

Re: Notice of Your Termination from the AmeriCorps VISTA Program

Dear **[Mr./Ms. NAME OF VISTA]**:

On **[DATE]**, I proposed your early termination from the AmeriCorps VISTA program, and provided you with an opportunity to rebut the allegations identified in the letter.

I advised you of your right to respond, and that if you wished to respond, you had until **[DATE]** to do so. I explained that any response you submitted must be directed to me and include the reasons you disagree with my proposed decision, as well as any relevant affidavits or written material to show why you should not be terminated from AmeriCorps VISTA.

Also in the **[DATE]** proposed termination letter, I advised you that you had been placed on Administrative Hold status, pending the outcome of these termination proceedings. I also informed you that you had the option of resigning from AmeriCorps VISTA service in lieu of the continuation of these termination proceedings, and that if you chose to resign, you must do so by **[DATE]**. I also advised you that if you chose not to resign by then, you would be terminated from AmeriCorps VISTA service on or after **[ONE WORK DAY AFTER THAT “DATE”]**.

As of today, **[DATE]**, you have not resigned from your AmeriCorps VISTA service. Moreover, I have received no response from you regarding your **[DATE]** proposed termination.

After a careful review of the facts and circumstances in this matter, including review and consideration of all the material provided to me in the matter, I have determined that cause for your termination from service as an AmeriCorps VISTA member has been established pursuant to *45 CFR § 2556.400*. I have determined that your **[DESCRIBE CONDUCT AND/OR PERFORMANCE PROBLEMS]** demonstrates that you violated **[CITE APPROPRIATE 45 CFR § 2556.400 "FOR CAUSE" GROUND(S)]**.

Therefore, effective **[TODAY or DATE OF ISSUANCE OF THIS LETTER]**, you are hereby terminated from the AmeriCorps VISTA program, and your placement in Administrative Hold status has been discontinued.

Sincerely,

[NAME]
State Program Director, **[STATE]**

TEMPLATE 26B-4: FINAL EARLY TERMINATION “FOR CAUSE” (CONDUCT AND/OR PERFORMANCE PROBLEMS) VISTA RESPONDED TO PROPOSED TERMINATION

This letter is issued only after the CSO: (1) sends the proposed letter to the VISTA; (2) allows the VISTA an opportunity to respond, (3) the VISTA has responded at least once during the response period; (4) the CSO reviews any response the VISTA submits to the CSO; and (5) the CSO still believes termination for cause is warranted. This letter is issued after the CSO has investigated the matter, reviewed all relevant material it gathered or received from the sponsor and the VISTA, and the CSO and the Area Manager believe that such early termination for cause (conduct and/or performance problems) is warranted under 45 CFR § 2556.400.

Replace all boldface and capitalized text in brackets with appropriate data and remove formatting and brackets.

VIA EMAIL AND VIA OVERNIGHT MAIL

[DATE]

[NAME OF VISTA PROPOSED FOR TERMINATION]
[ADDRESS]

Re: Notice of Your Termination from the AmeriCorps VISTA Program

Dear **[Mr./Ms. NAME OF VISTA]**:

On **[DATE OF PROPOSED TERMINATION LETTER]**, I proposed your early termination from the AmeriCorps VISTA program, and provided you with an opportunity to rebut the allegations identified in the letter. After a careful review of the facts and circumstances of your situation, as well as conversations with you **[IF THAT APPLIES]**, and a review of all the material provided to me in the matter, I have determined that cause of termination of your service as an AmeriCorps VISTA member has been established pursuant to 45 CFR § 2556.400. The relevant **provision(s) state(s)** that based on your **[CITE REASON AND APPROPRIATE GROUND(S) FROM 45 CFR § 2556.400]**, the Corporation for National & Community Service (CNCS) may terminate you. I have determined that your **[conduct/performance]** in **[DESCRIBE CONDUCT AND/OR PERFORMANCE PROBLEMS]** clearly show(s) that you violated **[CITE APPROPRIATE GROUND(S)]**.

In the **[DATE OF PROPOSED TERMINATION LETTER]** proposed termination letter to you, I also informed you that you had the option to resign from AmeriCorps VISTA service in lieu of the continuation of these termination proceedings, and advised you that if you chose to resign, you must do so by **[DATE – DEADLINE TO RESPOND/RESIGN]**. I also told you that if you chose not to resign by then, you would be terminated from AmeriCorps VISTA service on or after **[DATE – ONE WORK DAY AFTER “DATE OF**

PROPOSED TERMINATION LETTER”]. As of today, you have not resigned from your AmeriCorps VISTA service.

I have considered the entire record in this matter, including all of the information you have provided in your **[DATE OF RESPONSE RECEIVED FROM VISTA MEMBER]** response(s), to the **[DATE OF PROPOSED TERMINATION LETTER]** proposed termination. None of the information in the record persuades me that action other than your termination from the AmeriCorps VISTA program is warranted. The record shows that you have violated **45 CFR § 2556.400(____) [and (____)]** “termination for cause” **section(s)**, and you have provided insufficient evidence to refute that you have violated **this/these section(s)**. **[IF VISTA MEMBER PROVIDES INSUFFICIENT EVIDENCE OR ARGUMENT, ADD ANALYSIS AS APPROPRIATE THAT DESPITE THE EVIDENCE OR ARGUMENT, TERMINATION FOR CAUSE IS STILL THE APPROPRIATE ACTION.]**

Therefore, effective **[ENTER DATE AT LEAST ONE WORK DAY AFTER THE DATE OF THIS LETTER]**, you are hereby terminated from the AmeriCorps VISTA program, and your placement on Administrative Hold status has been suspended.

If you have questions, the “for cause” termination procedure is found in 45 CFR § 2556.400.

Sincerely,

[NAME]

State Program Director, **[STATE]**

TEMPLATE 26C-1: SPONSOR NOTIFICATION – REMOVAL OF VISTA FROM PROJECT (MEDICAL TERMINATION PROCESS)

This letter serves as a record, and confirms for the Sponsor where the VISTA had most recently been serving, that the CSO has removed the VISTA from the sponsor's project. Also, this letter lets the Sponsor know that the CSO may be back in touch to get additional information about the circumstances leading to the CSO's removal – which aids the CSO in determining whether early medical termination of the VISTA may be appropriate.

Replace all boldface and capitalized text in brackets with appropriate data and remove formatting and brackets.

VIA EMAIL AND OVERNIGHT MAIL

[DATE]

[NAME OF VISTA SUPERVISOR]
[SPONSOR ADDRESS]

Re: **[NAME OF VISTA]** – Removal from **[NAME OF SPONSOR]**/Placement on Administrative Hold

Dear **[Mr./Ms. NAME OF VISTA SUPERVISOR]**:

Effective **[TODAY/DATE]**, my office, the **[STATE]** State Office, has removed **[NAME OF VISTA]** from AmeriCorps VISTA service at your organization, the **[SPONSOR/PROJECT]**, and placed **[him/her]** in Administrative Hold status for a period not to exceed 30 days.

[NAME OF VISTA] has been advised that while on Administrative Hold **[he/she]** may not report to the **[SPONSOR/PROJECT]**, nor may you work on any project-related activities. All legal, political, religious, and other restrictions that are explained in the AmeriCorps VISTA Member Handbook remain in effect.

My office will get back to you if we require any further information regarding certain circumstances leading to **[NAME OF VISTA]**'s removal from **[SPONSOR/PROJECT]**. Please contact me should you have any questions at **[PHONE]** or at **[E-MAIL]**.

Sincerely,

[NAME], [STATE] Program Director

TEMPLATE 26C-2: EARLY TERMINATION – MEDICAL TERMINATION

The CSO uses this letter when a VISTA is unable to continue with his or her service because of a medical condition(s). This termination is appropriate when the CSO has facts evidencing a medical condition—from either the VISTA, the Sponsor, the attending doctor/physician, the attending caregiver, or other valid information the CSO has obtained—that does not allow the VISTA to serve.

This "medical termination" situation is somewhat complex and requires the CSO to write the first paragraph of the letter with facts appropriate to the particular situation. Complexity arises in knowing what facts are appropriate to put in the letter and what facts are not. Consult with the Area Manager when considering issuing this letter.

Replace all boldface and capitalized text in brackets with appropriate data and remove formatting and brackets.

VIA EMAIL AND VIA OVERNIGHT MAIL

[DATE]

[NAME OF VISTA PROPOSED FOR TERMINATION]

[ADDRESS]

Re: Your Medical Termination from the AmeriCorps VISTA Program Effective [DATE]

Dear [Mr./Ms. NAME OF VISTA]:

I have been advised by [NAME OF SPONSOR] AmeriCorps VISTA program that since [INSERT DATE] you have not reported to your AmeriCorps VISTA site for service. **[INSERT/EDIT FACTS AS APPROPRIATE TO SPECIFIC SITUATION. FOR INSTANCE, IF THE VISTA – NOT THE SPONSOR – TOLD THE CSO ABOUT THE MEDICAL CONDITION, EDIT FACTS ACCORDINGLY.]**

I was also advised that, as of [INSERT DATE], you had exhausted all your 20 calendar days of allowable leave, both personal and sick leave, with [NAME OF SPONSOR]. **[INSERT/EDIT FACTS AS APPROPRIATE TO SPECIFIC SITUATION]**

Additionally, I have been advised that you have used most or all of your allowable leave for medical reasons. **[INSERT/EDIT FACTS AS APPROPRIATE TO SPECIFIC SITUATION]**. Moreover, your continued use of leave from service, beyond the exhaustion of your allowable leave, has been for medical reasons. Medical termination is appropriate when AmeriCorps VISTA members are unable to resume project duties or when

they have exhausted their personal and medical leave because of a health related matter.

Therefore, I have determined that it is appropriate to terminate you from the AmeriCorps VISTA program for medical reasons. This is to notify you that your medical termination from the AmeriCorps VISTA program will take effect on **[DATE]**.

Effective **[IMMEDIATELY/ENTER DATE]**, you **[HAVE BEEN/WERE]** placed in Administrative Hold status. You currently remain in Administrative Hold status. You will remain in this status until your termination on **[DATE]**. During this period, you will continue to receive a living allowance.

Please also know following your medical termination, you will receive a prorated **[STIPEND or EDUCATION AWARD]** based on the service performed thus far in the AmeriCorps VISTA program. You are eligible to receive a partial end-of-service award because your early termination from the AmeriCorps VISTA is based on a compelling, personal, compelling circumstance.

If you have been receiving health care coverage while in service under the AmeriCorps Health Benefit Plan, your coverage will end at midnight on **[DATE]**. Also, if you have been receiving health care coverage from another health care coverage plan, it is possible that your coverage may end upon your medical termination from AmeriCorps VISTA. To ensure your continued health care coverage without interruption, you are encouraged to contact immediately a health coverage plan for which are eligible, such as Medicaid, or a health care coverage plan within the Health Insurance Marketplace. You may obtain a health care coverage plan through an "exchange" online at the [Health Insurance Marketplace](http://www.healthcare.gov), located at www.healthcare.gov. Depending on the state where you live, you may be able enroll in a specific state exchange, or alternatively, the Federal exchange. If you are eligible to enroll in an exchange, please act immediately to ensure continuity in health coverage.

Also, if you believe your medical condition is AmeriCorps VISTA service-related, you may consider applying for federal workers compensation benefits. Applications for such benefits are reviews and adjudicated by the U.S. Department of Labor, not by the Corporation for National & Community Service (CNCS) or AmeriCorps VISTA. Information on these benefits is in Chapter 8 of the *AmeriCorps VISTA Member Handbook*, in the section entitled "Federal Employees' Compensation Act".

Finally, if you wish to reenter service following your medical termination and a recovery period, you may reapply to the VISTA program and begin a new, full term of service.

If you have any questions please contact **[SPD/SPS NAME]** at **[PHONE NUMBER]** or **[EMAIL ADDRESS]**

Sincerely,

[NAME]

[STATE] State Program Director

TEMPLATE 26D-1: SPONSOR NOTIFICATION – REMOVAL OF VISTA FROM PROJECT (REASSIGNMENT OPPORTUNITY PROCESS)

This letter serves as a record, and confirms for the sponsor where the VISTA had most recently been serving, that the CSO has removed the VISTA from the sponsor's project. Also, this letter lets the Sponsor know that the CSO may be back in touch to get additional information about the circumstances leading to the CSO's removal, which may aid the CSO in determining whether it is appropriate to provide the VISTA an opportunity to secure reassignment, or it is appropriate for the CSO to propose the VISTA's termination for cause.

Replace all boldface and capitalized text in brackets with appropriate data and remove formatting and brackets.

VIA EMAIL OR OVERNIGHT MAIL

[DATE]

[NAME OF VISTA SUPERVISOR]
[SPONSOR ADDRESS]

Re: **[NAME OF VISTA]** – Removal from **[NAME OF SPONSOR]**/Placement on Administrative Hold

Dear **[Mr./Ms. NAME OF VISTA SUPERVISOR]**:

Effective **[TODAY/DATE]**, my office, the **[STATE]** State Office, has removed **[NAME OF VISTA]** from AmeriCorps VISTA service at your organization, the **[SPONSOR/PROJECT]**, and placed **[him/her]** in Administrative Hold status for a period not to exceed 30 days.

[NAME OF VISTA] has been advised that while on Administrative Hold **[he/she]** may not report to the **[SPONSOR/PROJECT]**, nor may **[he/she]** work on any project-related activities. All legal, political, religious, and other restrictions that are explained in the *AmeriCorps VISTA Member Handbook* remain in effect.

My office will get back to you if we require any further information regarding the circumstances leading to **[NAME OF VISTA]**'s removal from **[SPONSOR/PROJECT]**. Please contact me should you have any questions at **[PHONE]** or at **[E-MAIL]**.

Sincerely,

[NAME], [STATE] Program Director

TEMPLATE 26D-2: PROPOSED EARLY TERMINATION – VISTA REMOVED FROM SITE (OPPORTUNITY TO SECURE REASSIGNMENT/POSSIBLE “NON-CAUSE” TERMINATION IF UNABLE TO SECURE SUITABLE ASSIGNMENT)

This is the letter to the VISTA when the CSO determines that reassignment—as opposed to proposed termination for cause—is warranted. This letter provides the VISTA an opportunity to secure a reassignment to another project within 15 days, and if that is not accomplished, provides notice that the VISTA will need to be terminated for lack of suitable assignment, which is a “non-cause” reason.

Replace all boldface and capitalized text in brackets with appropriate data and remove formatting and brackets.

**VIA EMAIL [VISTA’S PERSONAL EMAIL ADDRESS]
AND VIA OVERNIGHT MAIL**

[TODAY’S DATE]

**[NAME OF VISTA REMOVED FROM SPONSOR/PROJECT]
[ADDRESS]**

Re: Opportunity for You to Secure Reassignment;
Placement in Administrative Hold Status

Dear **[Mr./Ms. LAST NAME OF VISTA]:**

On **[DATE OF REQUEST FOR REMOVAL]**, your AmeriCorps VISTA sponsor **[NAME OF SPONSOR]** requested your removal from the project, and on **[DATE CSO GRANTED REQUEST FOR REMOVAL]**, this office granted the request. The project requested your removal because **[INSERT FACTS]**.

When a sponsoring organization requests the removal of an AmeriCorps VISTA member from a project, the Corporation for National & Community Service (CNCS) must honor the request.

If you are interested in continuing your AmeriCorps VISTA service on a different project, you have until **[INSERT DATE THAT IS 15 DAYS FROM TODAY’S DATE]** to locate and secure another assignment. To that end, I refer you to the online My AmeriCorps portal for listings of VISTA positions located at **[ENTER URL ADDRESS]**. After you review the lists, please contact this office immediately to determine whether the project(s) for which you are interested in securing possible reassignment has approval for member placements. Please remember that before CNCS can approve a transfer to another project, the project supervisor must speak with you and with the **[PRIOR VISTA PROJECT]** and submit to the **[STATE]** CNCS State Office a written request for your transfer.

You were placed in Administrative Hold status effective **[DATE VISTA WAS PLACED IN ADMINISTRATIVE HOLD]**. You currently remain in that status. While you are in Administrative Hold status, you will continue to receive your allowances, but you are not to report back to your AmeriCorps VISTA project or participate in any project-related activities. All provisions of the *AmeriCorps VISTA Member Handbook* regarding your activities and conduct remain in effect through this period.

If you are unable to secure a suitable assignment within the Administrative Hold status period, your AmeriCorps VISTA service will be terminated as of **[INSERT DATE THAT IS AT LEAST 17 DAYS FROM TODAY'S DATE]**. Such an early termination from the VISTA program would be for a non-cause reason.

If you have any questions, the procedure for early termination for lack of suitable assignment is found in the VISTA Member Handbook, Chapter 12: Administrative Policies. Please do not hesitate to call me at **[TELEPHONE NUMBER]** or **[EMAIL]** if you have any questions.

Sincerely,

[NAME]
State Program Director, **[STATE]**

TEMPLATE 26D-3: FINAL EARLY TERMINATION FOR “NON-CAUSE” LACK OF SUITABLE ASSIGNMENT

This is the “termination for lack of suitable assignment” letter to the VISTA if the VISTA does not secure a reassignment following a 15-day opportunity period to do so. The CSO must always send first the Proposed Letter (Template 26D-2, “Proposed Early Termination – Opportunity to Secure Reassignment”).

Replace all boldface and capitalized text in brackets with appropriate data and remove formatting and brackets.

**VIA EMAIL [VISTA’S PERSONAL EMAIL ADDRESS]
AND VIA OVERNIGHT MAIL**

[TODAY’S DATE]

**[NAME OF VISTA TERMINATED FOR LACK OF SUITABLE ASSIGNMENT]
[ADDRESS]**

Re: Notice of Your Termination from the AmeriCorps VISTA Program for
Lack of Suitable Assignment

Dear **[Mr./Ms. LAST NAME OF VISTA]:**

Since **[ENTER DATE]**, this office has provided you the opportunity to locate and secure a suitable reassignment. However, as of today, **[TODAY’S DATE]**, this office has not been advised that you have secured an appropriate alternative assignment. In accordance with the administrative policies of the AmeriCorps VISTA program, the Corporation for National & Community Service (CNCS) must terminate your AmeriCorps VISTA service effective **[DATE OF TERMINATION – TODAY’S DATE]**, for lack of suitable assignment.

You will receive any subsistence allowance earned to date, **[AS APPLICABLE: as well as travel payment to be used to return home]**. Please note that your coverage under the AmeriCorps VISTA member health plan expires at midnight on **[DATE OF TERMINATION]**.

Please accept my thanks for your AmeriCorps VISTA service and best wishes for your future success.

Sincerely,

[NAME], State Program Director
[STATE]

TEMPLATE 26D-4: NOTICE OF PROJECT CLOSURE (OPPORTUNITY TO SECURE REASSIGNMENT/POSSIBLE “NON-CAUSE” TERMINATION FOR LACK OF SUITABLE ASSIGNMENT)

This is the letter to the VISTA when the sponsor/project is expected to be shut down or otherwise stopped for reasons unrelated to the VISTA’s performance/conduct, and reassignment of the VISTA is warranted under AmeriCorps VISTA administrative policies. This letter provides the VISTA an opportunity to secure a suitable reassignment to another project, and if that cannot be accomplished, notification that the VISTA will need to be terminated for lack of suitable assignment—a “non-cause” reason.

Replace all boldface and capitalized text in brackets with appropriate data and remove formatting and brackets.

**VIA EMAIL [INSERT VISTA’S PERSONAL EMAIL ADDRESS]
AND VIA OVERNIGHT MAIL**

[TODAY’S DATE]

**[NAME OF VISTA REMOVED FROM SPONSOR/PROJECT]
[ADDRESS]**

Re: Your Removal from the [NAME OF PROJECT] and Placement in Administrative Hold Status

Dear **[Mr./Ms. LAST NAME OF VISTA]:**

I have just received certain information regarding your AmeriCorps VISTA project, **[NAME OF PROJECT/SPONSOR]**. Based on that information, it may be necessary for the AmeriCorps VISTA operations of **[NAME OF PROJECT/SPONSOR]**, in which you have served, to cease shortly.

Therefore, effective today, you have been removed from the **[NAME OF PROJECT/SPONSOR]** AmeriCorps VISTA project, and placed in Administrative Hold status for a period not to exceed 30 days. While on Administrative Hold, you will continue to receive regular living allowances. You will remain on Administrative Hold while my office supports you in securing a suitable reassignment to another AmeriCorps VISTA project.

If you are interested in continuing your AmeriCorps VISTA service on a different project, you have **[INSERT DATE 15 DAYS FROM TODAY’S DATE]** to locate and secure another assignment. You can review a list of possible VISTA project assignments that are currently available at **[ENTER PROPER URL]**. After you review the list, please contact this office immediately to determine whether the project(s) where you are interested in securing possible reassignment has approval for member placements.

If you are unable to secure a suitable reassignment by **[INSERT DATE 15 DAYS FROM TODAY’S DATE]**, you will be terminated from the AmeriCorps VISTA program for

lack of suitable assignment, a “non-cause” reason (*AmeriCorps VISTA Member Handbook*, Chapter 12: Administrative Policies).

During this period of your placement on Administrative Hold, you may not report to the **[NAME OF PROJECT/SPONSOR]** site for service or work on any project-related activities. All legal, political, religious, and other restrictions that are explained in the *AmeriCorps VISTA Member Handbook* remain in effect. Please do not hesitate to call me at **[PHONE]** if you have any questions.

Sincerely,

[NAME]
State Program Director, **[STATE]**

TEMPLATE 26D-5: FINAL EARLY TERMINATION FOR “NON-CAUSE” –
PROJECT CLOSURE LACK OF SUITABLE ASSIGNMENT

This is the “termination for lack of suitable assignment” letter to the VISTA member if the Sponsor’s project could not continue for reasons unrelated to the member’s performance or conduct, and the member’s reassignment according to AmeriCorps VISTA administrative policies cannot be accomplished – i.e., if the member does not secure a reassignment following a 15 day opportunity period to do so. You must always send the Proposed letter (Template 26D-4, “Notice of Project Closure: Opportunity to Secure Reassignment”) before sending this letter.

Replace all boldface and capitalized text in brackets with appropriate data and remove formatting and brackets.

**VIA EMAIL [VISTA’S PERSONAL EMAIL ADDRESS]
AND VIA OVERNIGHT MAIL**

[TODAY’S DATE]

**[NAME OF VISTA REMOVED FROM SPONSOR/PROJECT]
[ADDRESS]**

Re: Notice of Your Termination from the AmeriCorps VISTA Program for
Lack of Suitable Assignment
Notice of Your Receipt of a Prorated End-of-Service Award

Dear **[Mr. /Ms. LAST NAME OF VISTA]:**

My office’s **[and your, if appropriate]** attempts to secure reassignment to another AmeriCorps VISTA project by **[ENTER DATE – MUST BE BEFORE TODAY’S DATE]** have been unsuccessful. Accordingly, the Corporation for National & Community Service (CNCS) must terminate your AmeriCorps VISTA service effective **[TODAY’S DATE]**, for lack of suitable assignment, in accordance with the administrative policies of the AmeriCorps VISTA program.

You will receive any subsistence allowance earned to date **[as well as travel payment to be used to return home, if applicable]**. Please note that your coverage under the AmeriCorps VISTA member health plan expires at midnight on **[DATE OF TERMINATION – TODAY’S DATE]**.

[INSERT THIS PARAGRAPH IF APPLICABLE] Also, your removal from your prior sponsor site was for reasons beyond your control. While you were available and willing to take a reassignment to another sponsoring organization following your removal, no suitable reassignment could be secured for you. Therefore, I have determined that your termination is for a

compelling, personal circumstance, and you will receive a prorated **[STIPEND OR EDUCATION AWARD]** based on the service you performed thus far in the AmeriCorps VISTA program.

Because your termination is due to the lack of a suitable assignment, there will be no negative reflection in your AmeriCorps VISTA record.

Please accept my thanks for your AmeriCorps VISTA service and best wishes for your future success.

Sincerely,

[NAME], State Program Director
[STATE]

TEMPLATE 26E: DESELECTION

This is a "deselection" letter used in rather limited situations. The CSO sends this letter when it determines that selection of an applicant or candidate into the VISTA program is not warranted because the individual is not suitable to serve. Deselection is only a valid action prior to commencement of a VISTA candidate's service in the VISTA program. This letter sets forth the reason(s) why the individual is not suitable to serve, and outlines the deselection procedure contained in AmeriCorps VISTA administrative policies.

Examples of when deselection is appropriate are: (1) a Trainee exhibits sufficiently disruptive or other troubling conduct at PSO; (2) the CSO learns during the application process that the applicant does not satisfy the citizenship requirements to be eligible to serve; or (3) the CSO determines during the application process that the applicant does not satisfy the criminal history criteria, and/or the CSO learns that the applicant has not adequately disclosed his/her criminal history.

Replace all boldface and capitalized text in brackets with appropriate data and remove formatting and brackets.

**VIA EMAIL [ENTER VISTA CANDIDATE'S PERSONAL EMAIL ADDRESS]
AND VIA OVERNIGHT MAIL**

[TODAY'S DATE]

**[NAME OF DESELECTEE]
[ADDRESS OF DESELECTEE]**

Re: Notice of Your Deselection from the AmeriCorps VISTA Program

Dear **[Mr./Ms. LAST NAME OF DESELECTEE]**:

On **[DATE]**, our office was notified by **[NAME(S) AND TITLE(S) OF CNCS EMPLOYEE(S)]**, that you are currently not suitable to enroll in the VISTA program based on **[ENTER SPECIFIC, RELEVANT FACTS JUSTIFYING DESELECTION OF DESELECTEE, E.G., FAILED TO DEMONSTRATE LEGAL RESIDENCY IN THE U.S., ENGAGED IN INAPPROPRIATE/UNPROFESSIONAL CONDUCT IN SEEKING TO ENROLL IN THE VISTA PROGRAM, ENGAGED IN INAPPROPRIATE/UNPROFESSIONAL CONDUCT DURING IN-PERSON OR ONLINE PSO]**.

After reviewing all the relevant information presented to me, I have determined that it is appropriate to deselect you from the AmeriCorps VISTA program. You have failed to demonstrate current suitability to enroll in the VISTA program.

You have a right to appeal this decision to deselect you. If you choose to do so, you must submit your appeal in writing and any supportive documentation within five (5) calendar days of the date of this Notice, to State Program Director of [STATE], at: [STATE PROGRAM DIRECTOR/STATE OFFICE ADDRESS/PHONE NUMBER/FAX NUMBER/E-MAIL ADDRESS]. Your appeal should include the reasons you disagree with the decision to deselect you, and any relevant affidavits or written material to show why you should not be deselected.

If you do not appeal this Notice within five calendar days, my decision to deselect you shall become final at the expiration of your deadline to appeal, i.e., six days after your receipt of this Notice. If you do appeal, I, or my designee, shall make a final decision, thereafter, based on all relevant information provided to me, including any appeal documentation or other appeal information you provide.

If you have any questions or need further information about deselection and related procedures, please refer to the *AmeriCorps VISTA Member Handbook*: Chapter 12: Administrative Policies.

Please be aware that as an alternative to deselection, you may elect to withdraw your AmeriCorps VISTA application within five calendar days of the date of this Notice. This may be done in writing to the address referenced above, or by email at: [EMAIL ADDRESS OF STATE OFFICE]. If you elect to withdraw your application, deselection proceedings shall cease.

[IF APPLICABLE – i.e., IF DESELECTEE ATTENDED AN IN-PERSON PSO EVENT AND INCURRED REIMBURSABLE TRAVEL EXPENSES – INCLUDE THIS PARAGRAPH: Because you were not approved for AmeriCorps VISTA service, our only remaining obligation to you is to reimburse you for any appropriate PSO travel expenses that you submitted on your travel voucher during PSO registration. The Corporation is currently processing your voucher.]

Sincerely,

[NAME]
[STATE PROGRAM DIRECTOR]

TEMPLATE 26F: CONFIRMATION OF VISTA RESIGNATION

This is the "closing" letter to the VISTA who voluntarily resigns from the VISTA program. This letter confirms that the VISTA resigned and that your office has accepted the resignation, and has or will code the VISTA's early termination as a resignation.

VISTAs who wish to resign from the VISTA program prior to completion of service must do so by submitting in writing (email acceptable) their resignation to the appropriate CSO. A written resignation eliminates ambiguity about the VISTA's intention and is important for VISTA program recordkeeping purposes.

A VISTA may submit his/her resignation in a variety of situations: (1) in response to receiving a proposed termination for cause; (2) in response to being removed from a project site for whatever reason; or (3) for reasons wholly unrelated to any CSO actions and with no prompting from the CSO at all. For purposes of this letter, the circumstances leading to the resignation do not matter. This is the CSO's confirmation letter that the VISTA program has accepted the written resignation of the VISTA regardless.

Replace all boldface and capitalized text in brackets with appropriate data and remove formatting and brackets. Replace all boldface and capitalized text in brackets with appropriate data and remove formatting and brackets.

VIA EMAIL AND VIA OVERNIGHT MAIL

[DATE]

**[NAME OF VISTA REMOVED FROM SPONSOR/PROJECT]
[ADDRESS]**

Re: Your Resignation from the AmeriCorps VISTA Program Effective **[DATE]**

Dear **[Mr./Ms. NAME OF VISTA]**:

I am in receipt of your letter dated **[DATE]** in which you resign from AmeriCorps VISTA effective **[DATE]**. I accept your resignation. Please note that all of your VISTA benefits have ceased on the date of your resignation, **[DATE OF RESIGNATION LETTER]**.

Thank you for your service with AmeriCorps VISTA.

Sincerely,

[NAME]
State Program **[Specialist/Director]**, **[STATE]**

TEMPLATE 26G-1: PROPOSED EARLY TERMINATION “FOR CAUSE” (FAILURE TO SUBMIT FINGERPRINTS)

This is the initial letter sent to the member to propose termination. This letter notifies the member of proposal of termination and admin hold status, in one letter rather than two separate letters. This letter also sets forth the known reasons related to the VISTA’s failure to submit completed fingerprint that warrant initiation of early termination “for cause” under 45 CFR § 2556.400(b)(2).

Replace all boldface and capitalized text in brackets with appropriate data and remove formatting and brackets. VISTA will provide the CSO with the necessary dates and justification for the member’s proposed termination.

VIA EMAIL AND VIA OVERNIGHT MAIL

[DATE]

[NAME OF VISTA PROPOSED FOR TERMINATION]

[ADDRESS]

Re: Notice of Your Proposed Termination from the AmeriCorps VISTA
Program

Dear **[Mr./Ms. NAME OF VISTA]**:

You had been assigned to serve at **[NAME OF PROJECT]** since **[DATE]**. There is credible evidence that you did not comply with an AmeriCorps VISTA program instruction by failing to submit two completed fingerprint cards to AmeriCorps VISTA HQ by the required deadline.

You failed to turn in your fingerprint cards by **[DEADLINE]**, despite multiple notifications:

- On **[DATE]**, you were provided a link to the “Guide to Entering AmeriCorps VISTA service,” which informed you of the requirement that completed fingerprint cards must be received by AmeriCorps VISTA HQ by **[DATE of Deadline]**.
- On **[DATE]**, you were reminded during **[TITLE OF WEBINAR]** that completed fingerprints cards must be received by AmeriCorps VISTA HQ by the deadline, **[DATE]**.
- On **[DATE]**, AmeriCorps VISTA HQ emailed you a reminder to submit your completed fingerprint cards.
- As of **[TODAY’S DATE]**, AmeriCorps VISTA HQ still has not received completed two fingerprint cards from you.

After a careful review of the facts and circumstances, grounds for your termination exist. I am proposing your termination for cause from service as an AmeriCorps VISTA member, in accordance with 45 CFR § 2556.400(b)(2)(violation of any provision of the Domestic Service Volunteer Act of 1973, as amended, or any CNCS or AmeriCorps VISTA program policy, regulation, or instruction) because you failed to comply with the AmeriCorps VISTA program instruction to submit two completed fingerprint cards to AmeriCorps VISTA HQ by the required deadline.

You have the opportunity to resign in lieu of the continuation of these termination proceedings. If you choose to resign, you must do so in writing. As **[STATE]** State Program Director, I must receive your written resignation by **[INSERT 13-15 CALENDAR DAYS FROM DATE OF THIS LETTER]**. You may fax or e-mail your resignation to me at fax: **[FAX NUMBER]**, e-mail: **[DOMAIN]**@cns.gov.

If you do not choose to resign, this letter serves to notify you of my intent to terminate you from AmeriCorps VISTA service on or after **[INSERT THE NEXT WORK DAY AFTER 13-15 CALENDAR DAYS FROM DATE OF THIS LETTER]**. However, you have the right to respond to this proposed termination. If you choose to respond, you have until **[INSERT THE NEXT WORK DAY AFTER 13-15 CALENDAR DAYS FROM DATE OF THIS LETTER]** for the **[STATE]** State Office to receive your written answer at Corporation for National & Community Service, **[STATE]** State Office, **[INSERT ADDRESS]** fax: **[FAX NUMBER]**; e-mail: **[DOMAIN]** @cns.gov. This letter should include the reasons you disagree with my proposed decision and any relevant affidavits or written material to show why you should not be terminated from AmeriCorps VISTA.

Effective **[TODAY OR EARLIER DATE AS APPROPRIATE]**, you **[HAVE BEEN]** placed in Administrative Hold status. While on Administrative Hold, you will continue to receive regular living allowances while in that status. You will remain in Administrative Hold status either until you resign or pending the outcome of these termination proceedings. If you resign or are terminated, your Administrative Hold status will be lifted and you will cease to receive a living allowance. Moreover, if you resign or are terminated, you will not receive an end-of-service award (*i.e.*, Education Award or post-service stipend). Further, during these proceedings, you may not report to the **[SPONSOR'S NAME OR SITE, AS APPROPRIATE]** project site for service, or work on any project-related activities. All legal, political, religious, and other restrictions that are explained in the *AmeriCorps VISTA Member Handbook* remain in effect. If your termination is reversed, any allowances lost during this period will be paid retroactively.

If you fail to respond to this proposed termination, in writing, to me by **[INSERT 13-15 CALENDAR DAYS FROM DATE OF THIS LETTER]**, and you do not resign by then, I will have no alternative but to terminate your AmeriCorps VISTA service on or after **[INSERT THE NEXT WORK DAY AFTER 13-15 CALENDAR DAYS FROM DATE OF THIS LETTER]**.

The procedure for termination for cause is found in in 45 CFR §§ 2556.400 - .430. Please contact me at **[PHONE NUMBER]** or at **[EMAIL]** if you have any questions.

Sincerely,

[NAME]
State Program Director, **[STATE]**

TEMPLATE 26G-2: ADMINISTRATIVE HOLD REMOVAL; CONCLUSION OF TERMINATION FOR CAUSE PROCEEDINGS (FAILURE TO SUBMIT FINGERPRINTS)

This letter is sent to the member after VISTA HQ receives the member's completed fingerprint cards during the response period (13-15 calendar days from the date of Proposed Early Termination letter). VISTA HQ will inform CSO when the completed fingerprint cards are submitted.

Replace all boldface and capitalized text in brackets with appropriate data and remove formatting and brackets. VISTA will provide the CSO with the necessary dates and justification for the member's proposed termination.

VIA EMAIL AND VIA OVERNIGHT MAIL

[DATE]

[NAME OF VISTA PROPOSED FOR TERMINATION]

[ADDRESS]

Re: Administrative Hold Removal; Conclusion of Termination for Cause Proceedings

Dear **[Mr./Ms. NAME OF VISTA]**:

On **[DATE]**, I proposed your termination for cause from service as an AmeriCorps VISTA member, in accordance with 45 CFR § 2556.400(b)(2) (violation of any provision of the Domestic Service Volunteer Act of 1973, as amended, or any CNCS or AmeriCorps VISTA program policy, regulation, or instruction) because you failed to comply with the AmeriCorps VISTA program instruction to submit your completed fingerprint cards to AmeriCorps VISTA HQ by the required deadline.

On **[DATE]**, AmeriCorps VISTA HQ received your fingerprints and we have removed you from administrative hold and concluded termination proceedings.

You may report back to **[Program]** and your placement with **[Sponsor]** where you most recently served and may continue your work on any project-related activities. Please note that your failure to comply with basic programmatic instructions has been noted in your member file and can serve as additional support for termination if your removal is requested in the future.

Please contact me at **[PHONE NUMBER]** or at **[EMAIL]** if you have any questions.

Sincerely,

[NAME]
State Program Director, **[STATE]**

TEMPLATE 26G-3: FINAL EARLY TERMINATION “FOR CAUSE” (FAILURE TO SUBMIT FINGERPRINTS) VISTA DOES NOT RESPOND TO PROPOSED TERMINATION

This letter is issued only after the CSO: (1) sends the proposed letter to the VISTA; (2) allows the VISTA an opportunity to respond; (3) the VISTA HAS NOT responded AT ALL during the response period.

Replace all boldface and capitalized text in brackets with appropriate data and remove formatting and brackets.

VIA EMAIL AND VIA OVERNIGHT MAIL

[DATE]

[NAME OF VISTA PROPOSED FOR TERMINATION]

[ADDRESS]

Re: Notice of Your Termination from the AmeriCorps VISTA Program

Dear **[Mr./Ms. NAME OF VISTA]**:

On **[DATE]**, I proposed your early termination from the AmeriCorps VISTA program, and provided you with an opportunity to rebut the allegations identified in the letter.

I advised you of your right to respond, and that if you wished to respond, you had until **[DATE]** to do so. I explained that any response you submitted must be directed to me and include the reasons you disagree with my proposed decision, as well as any relevant affidavits or written material to show why you should not be terminated from AmeriCorps VISTA.

Also in the **[DATE]** proposed termination letter, I advised you that you had been placed on Administrative Hold status, pending the outcome of these termination proceedings. I also informed you that you had the option of resigning from AmeriCorps VISTA service in lieu of the continuation of these termination proceedings, and that if you chose to resign, you must do so by **[DATE]**. I also advised you that if you chose not to resign by then, you would be terminated from AmeriCorps VISTA service on or after **[ONE WORK DAY AFTER THAT “DATE”]**.

As of today, **[DATE]**, you have not resigned from your AmeriCorps VISTA service. Moreover, I have received no response from you regarding your **[DATE]** proposed termination.

After a careful review of the facts and circumstances in this matter, including review and consideration of all the material provided to me in the matter, I have determined that cause for your termination from service as an AmeriCorps VISTA member has been established pursuant to 45 CFR § 2556.400. I have determined that your failure to comply with the AmeriCorps VISTA criminal history check requirement demonstrates that you violated 45 CFR § 2556.400(b)(2)(violation of any provision of the Domestic Service Volunteer Act of 1973, as amended, or any CNCS or AmeriCorps VISTA program policy, regulation, or instruction).

Therefore, effective **[TODAY or DATE OF ISSUANCE OF THIS LETTER]**, you are hereby terminated from the AmeriCorps VISTA program, and your placement in Administrative Hold status has been discontinued.

Sincerely,

[NAME]
State Program Director, **[STATE]**

TEMPLATE 26G-4: FINAL EARLY TERMINATION “FOR CAUSE” (FAILURE TO SUBMIT FINGERPRINTS) VISTA RESPONDED TO PROPOSED TERMINATION

This letter is issued only after the CSO: (1) sends the proposed letter to the VISTA; (2) allows the VISTA an opportunity to respond, (3) the VISTA has responded at least once during the response period but still did not submit completed fingerprint cards; (4) the CSO reviews any response the VISTA submits to the CSO; and (5) the CSO still believes termination for cause is warranted because the member still has failed to submit completed fingerprint cards.

Replace all boldface and capitalized text in brackets with appropriate data and remove formatting and brackets.

VIA EMAIL AND VIA OVERNIGHT MAIL

[DATE]

[NAME OF VISTA PROPOSED FOR TERMINATION]

[ADDRESS]

Re: Notice of Your Termination from the AmeriCorps VISTA Program

Dear **[Mr./Ms. NAME OF VISTA]:**

On **[DATE]**, I proposed your early termination from the AmeriCorps VISTA program, and provided you with an opportunity to rebut the allegations identified in the letter. After a careful review of the facts and circumstances of your situation, as well as conversations with you **[IF THAT APPLIES]**, and a review of all the material provided to me in the matter, I have determined that cause of termination of your service as an AmeriCorps VISTA member has been established pursuant to 45 CFR § 2556.400(b)(2). The relevant provision state that based on your failure to comply with AmeriCorps VISTA program instruction to submit two completed fingerprint cards to AmeriCorps VISTA HQ by the required deadline, the Corporation for National & Community Service (Corporation) may terminate you.

In the **[DATE]** proposed termination letter to you, I also informed you that you had the option to resign from AmeriCorps VISTA service in lieu of the continuation of these termination proceedings, and advised you that if you chose to resign, you must do so by **[DATE]**. I also told you that if you chose not to resign by then, you would be terminated from AmeriCorps VISTA service on or after **[DATE]**. As of today, you have not resigned from your AmeriCorps VISTA service.

I have considered the entire record in this matter, including all of the information you have provided in your **[DATE OF RESPONSE RECEIVED FROM VISTA MEMBER]**

response(s), to the **[DATE OF PROPOSED TERMINATION LETTER]** proposed termination. None of the information in the record persuades me that action other than your termination from the AmeriCorps VISTA program is warranted. The record shows that you have violated the **45 CFR § 2556.400(b)(2)** "termination for cause" section, and you have provided insufficient evidence to refute that you have violated this section. **[IF VISTA MEMBER PROVIDES INSUFFICIENT EVIDENCE OR ARGUMENT, ADD ANALYSIS AS APPROPRIATE THAT DESPITE THE EVIDENCE OR ARGUMENT, TERMINATION FOR CAUSE IS STILL THE APPROPRIATE ACTION]**

Therefore, effective **[ENTER DATE AT LEAST ONE WORK DAY AFTER THE DATE OF THIS LETTER]**, you are hereby terminated from the AmeriCorps VISTA program, and your placement on Administrative Hold status has been suspended.

If you have questions, the "for cause" termination procedure is found in 45 CFR § 2556.400

Sincerely,

[NAME]

State Program Director, **[STATE]**

TEMPLATE 26H-1: SPONSOR NOTIFICATION – REMOVAL OF VISTA SUMMER ASSOCIATE FROM PROJECT

This letter serves as a record, and confirms for the sponsor where the VISTA Summer Associate had most recently been serving, that the CSO has removed the VISTA Summer Associate from the sponsor's project. Also, this letter lets the sponsor know that the CSO may be back in touch to get additional information about the circumstances leading to the removal, which may aid the CSO in determining whether it is appropriate to provide the VISTA Summer Associate an opportunity for reassignment or it is appropriate to propose the VISTA Summer Associate's termination for cause.

Replace all boldface and capitalized text in brackets with appropriate data and remove formatting and brackets.

VIA EMAIL AND OVERNIGHT MAIL

[DATE]

[NAME OF VISTA SUPERVISOR]
[SPONSOR ADDRESS]

Re: **[NAME OF VISTA]** – Removal from **[NAME OF SPONSOR]**/Placement on Administrative Hold

Dear **[Mr./Ms. NAME OF VISTA SUPERVISOR]**:

Effective **[TODAY/DATE]**, my office, the **[STATE]** State Office, has removed **[NAME OF VISTA]** from AmeriCorps VISTA Summer Associate service at your organization, the **[SPONSOR/PROJECT]**, and placed **[him/her]** in Administrative Hold status for a period not to exceed 5 days.

[NAME OF VISTA] has been advised that while on Administrative Hold **[he/she]** may not report to the **[SPONSOR/PROJECT]**, nor may **[he/she]** work on any project-related activities. All legal, political, religious, and other restrictions that are explained in the *AmeriCorps VISTA Member Handbook* remain in effect.

My office will get back to you if we require any further information regarding the circumstances leading to **[NAME OF VISTA]**'s removal from **[SPONSOR/PROJECT]**. Please contact me should you have any questions at **[PHONE]** or at **[E-MAIL]**.

Sincerely,

[NAME], [STATE] Program Director

TEMPLATE 26H-2: VISTA SUMMER ASSOCIATE PROPOSED EARLY TERMINATION “FOR CAUSE” (CONDUCT AND/OR PERFORMANCE PROBLEMS)

This is the initial letter sent to the VISTA Summer Associate after the CSO determines it is necessary to propose to terminate the VISTA Summer Associate. This letter also sets forth the known reasons related to the VISTA Summer Associate’s alleged conduct and/or performance problems that warrant initiation of early termination.

Replace all boldface and capitalized text in brackets with appropriate data and remove formatting and brackets.

VIA EMAIL AND VIA OVERNIGHT MAIL

[DATE]

[NAME OF VISTA PROPOSED FOR TERMINATION]
[ADDRESS]

Re: Notice of Your Proposed Termination from the AmeriCorps VISTA Summer Associate Program

Dear **[Mr./Ms. NAME OF VISTA]**:

On **[DATE]**, your AmeriCorps VISTA Summer Associate sponsor **[NAME OF SPONSOR]**, wrote this office requesting your removal from the project. On **[DATE]**, I granted **[NAME OF SPONSOR]**’s request.

You had been assigned to serve at **[NAME OF PROJECT]** since **[DATE]**. Based on information provided by **[NAME OF SPONSOR]**, there is credible evidence that **[LIST AS MANY REASONS, AS APPLICABLE]**:

- 1) You have failed to _____;
- 2) You _____; and
- 3) You _____.

After a careful review of the facts and circumstances, grounds for your termination exist. I am proposing your termination for cause from service as an AmeriCorps VISTA Summer Associate because you: **[REMOVE OR KEEP FOLLOWING CLAUSES AS APPROPRIATE]** 1) failed to perform prescribed VISTA Summer Associate project duties as directed by the VISTA project; 2) were involved in activities which substantially interfered with the performance of your VISTA Summer Associate project duties; 3) engaged in

conduct which substantially diminished your effectiveness as a VISTA Summer Associate; and 4) performed your VISTA Summer Associate assignment in an unsatisfactory manner.

You have the opportunity to resign in lieu of the continuation of these termination proceedings. If you choose to resign, you must do so in writing. As **[STATE]** State Program Director, I must receive your written resignation by **[INSERT 3 - 5 CALENDAR DAYS FROM DATE OF THIS LETTER]**. You may fax or e-mail your resignation to me at fax: **[FAX NUMBER]**, e-mail: **[DOMAIN]**@cns.gov.

If you do not choose to resign, this letter serves to notify you of my intent to terminate you from AmeriCorps VISTA Summer Associate service on or after **[INSERT THE NEXT WORK DAY AFTER 3 - 5 CALENDAR DAYS FROM DATE OF THIS LETTER]**. However, you have the right to respond to this proposed termination. If you choose to respond, you have until **[INSERT THE NEXT WORK DAY AFTER 3 - 5 CALENDAR DAYS FROM DATE OF THIS LETTER]** for the **[STATE]** State Office to receive your written answer at Corporation for National & Community Service, **[STATE]** State Office, **[INSERT ADDRESS]** fax: **[FAX NUMBER]**; e-mail: **[DOMAIN]** @cns.gov. This letter should include the reasons you disagree with my proposed decision and any relevant affidavits or written material to show why you should not be terminated as an AmeriCorps VISTA Summer Associate.

Effective **[TODAY OR EARLIER DATE AS APPROPRIATE]**, you **[HAVE BEEN/WERE]** placed in Administrative Hold status. You currently remain in Administrative Hold status. While on Administrative Hold, you will continue to receive regular living allowances while in that status. You will remain in Administrative Hold status either until you resign or pending the outcome of these termination proceedings. If you resign or are terminated, your Administrative Hold status will be lifted and you will cease to receive a living allowance. Moreover, if you resign or are terminated, you will not receive an end-of-service award (i.e., Education Award or post-service stipend). Further, during these proceedings, you may not report to the **[SPONSOR'S NAME OR SITE, AS APPROPRIATE]** project site for service, or work on any project-related activities. All legal, political, religious, and other restrictions that are explained in the *AmeriCorps VISTA Member Handbook* remain in effect. If your termination is reversed, any allowances lost during this period will be paid retroactively.

If you fail to respond to this proposed termination, in writing, to me by **[INSERT 3 - 5 CALENDAR DAYS FROM DATE OF THIS LETTER]**, and you do not resign by then, I will have no alternative but to terminate your AmeriCorps VISTA Summer Associate service on or after **[INSERT THE NEXT WORK DAY AFTER 3 - 5 CALENDAR DAYS FROM DATE OF THIS LETTER]**.

Please contact me at **[PHONE NUMBER]** or at **[EMAIL]** if you have any questions.

Sincerely,

[NAME]
State Program Director, **[STATE]**

TEMPLATE 26H-3: VISTA SUMMER ASSOCIATE FINAL EARLY
TERMINATION “FOR CAUSE” (CONDUCT AND/OR PERFORMANCE
PROBLEMS) VISTA SUMMER ASSOCIATE DOES NOT RESPOND TO
PROPOSED TERMINATION

This letter is issued only after the CSO: (1) sends the proposed (initial) letter to the VISTA Summer Associate; (2) allows the VISTA Summer Associate an opportunity to respond; (3) the VISTA Summer Associate HAS NOT responded AT ALL during the response period, and the CSO and the Area Manager still believe termination for cause is warranted. This letter is issued after the CSO has investigated the matter, reviewed all relevant material it gathered or received from the sponsor and the VISTA Summer Associate, and believes that such early termination for cause (conduct and/or performance problems) is warranted.

Replace all boldface and capitalized text in brackets with appropriate data and remove formatting and brackets.

VIA EMAIL AND VIA OVERNIGHT MAIL

[DATE]

[NAME OF VISTA PROPOSED FOR TERMINATION]
[ADDRESS]

Re: Notice of Your Termination from the AmeriCorps VISTA Summer Associate Program

Dear **[Mr./Ms. NAME OF VISTA]**:

On **[DATE]**, I proposed your early termination from the AmeriCorps VISTA Summer Associate program, and provided you with an opportunity to rebut the allegations identified in the letter.

I advised you of your right to respond, and that if you wished to respond, you had until **[DATE]** to do so. I explained that any response you submitted must be directed to me and include the reasons you disagree with my proposed decision, as well as any relevant affidavits or written material to show why you should not be terminated from the AmeriCorps VISTA Summer Associate program.

Also in the **[DATE]** proposed termination letter, I advised you that you had been placed on Administrative Hold status, pending the outcome of these termination proceedings. I also informed you that you had the option of resigning from AmeriCorps VISTA Summer Associate service in lieu of the continuation of these termination proceedings, and that if you chose to resign, you must do so by **[DATE]**. I also advised you that if you chose not to resign by then, you would be terminated from AmeriCorps VISTA service on or after **[ONE WORK DAY AFTER THAT “DATE”]**.

As of today, **[DATE]**, you have not resigned from your AmeriCorps VISTA Summer Associate service. Moreover, I have received no response from you regarding your **[DATE]** proposed termination.

After a careful review of the facts and circumstances in this matter, including review and consideration of all the material provided to me in the matter, I have determined that cause for your termination from service as an AmeriCorps VISTA Summer Associate member has been established because you: **[REMOVE OR KEEP FOLLOWING CLAUSES AS APPROPRIATE]** 1) failed to perform prescribed VISTA Summer Associate project duties as directed by the VISTA project; 2) were involved in activities which substantially interfered with the performance of your Summer Associate project duties; 3) engaged in conduct which substantially diminished your effectiveness as a Summer Associate; and 4) performed your VISTA Summer Associate assignment in an unsatisfactory manner.

Therefore, effective **[TODAY or DATE OF ISSUANCE OF THIS LETTER]**, you are hereby terminated from the AmeriCorps VISTA Summer Associate program, and your placement in Administrative Hold status has been discontinued.

Sincerely,

[NAME]
State Program Director, **[STATE]**

TEMPLATE 26H-4: FINAL EARLY TERMINATION “FOR CAUSE” (CONDUCT AND/OR PERFORMANCE PROBLEMS) VISTA SUMMER ASSOCIATE RESPONDED TO PROPOSED TERMINATION

This letter is issued only after the CSO: (1) sends the proposed letter to the VISTA Summer Associate; (2) allows the VISTA Summer Associate an opportunity to respond, (3) the VISTA Summer Associate has responded at least once during the response period; (4) the CSO reviews any response the VISTA Summer Associate submits to the CSO; and (5) the CSO still believes termination for cause is warranted. This letter is issued after the CSO has investigated the matter, reviewed all relevant material it gathered or received from the sponsor and the VISTA Summer Associate, and the CSO and the Area Manager believe that such early termination for cause (conduct and/or performance problems) is warranted.

Replace all boldface and capitalized text in brackets with appropriate data and remove formatting and brackets.

VIA EMAIL AND VIA OVERNIGHT MAIL

[DATE]

[NAME OF VISTA PROPOSED FOR TERMINATION]
[ADDRESS]

Re: Notice of Your Termination from the AmeriCorps VISTA Summer Associate Program

Dear **[Mr./Ms. NAME OF VISTA]**:

On **[DATE OF PROPOSED TERMINATION LETTER]**, I proposed your early termination from the AmeriCorps VISTA Summer Associate program, and provided you with an opportunity to rebut the allegations identified in the letter. After a careful review of the facts and circumstances of your situation, as well as conversations with you **[IF THAT APPLIES]**, and a review of all the material provided to me in the matter, I have determined that cause of termination of your service as an AmeriCorps VISTA Summer Associate has been established. I have determined that your **[conduct/performance]** in **[DESCRIBE CONDUCT AND/OR PERFORMANCE PROBLEMS]** clearly indicate(s) that you violated **[CITE APPROPRIATE GROUND(S)]**.

In the **[DATE OF PROPOSED TERMINATION LETTER]** proposed termination letter to you, I also informed you that you had the option to resign from AmeriCorps VISTA Summer Associate service in lieu of the continuation of these termination proceedings, and advised you that if you chose to resign, you must do so by **[DATE – DEADLINE TO RESPOND/RESIGN]**. I also told you that if you chose not to resign by then, you would be terminated from AmeriCorps VISTA Summer Associate service on or after **[DATE – ONE WORK DAY AFTER “DATE OF PROPOSED TERMINATION LETTER”]**. As of today, you have not resigned from your AmeriCorps VISTA Summer Associate service.

I have considered the entire record in this matter, including all of the information you have provided in your **[DATE OF RESPONSE RECEIVED FROM VISTA SUMMER ASSOCIATE]** response(s), to the **[DATE OF PROPOSED TERMINATION LETTER]** proposed termination. None of the information in the record persuades me that action other than your termination from the AmeriCorps VISTA Summer Associate program is warranted because you: **[REMOVE OR KEEP FOLLOWING CLAUSES AS APPROPRIATE]** 1) failed to perform prescribed VISTA Summer Associate project duties as directed by the VISTA project; 2) were involved in activities which substantially interfered with the performance of your Summer Associate project duties; 3) you engaged in conduct which substantially diminished your effectiveness as a Summer Associate; and 4) you performed your VISTA Summer Associate assignment in an unsatisfactory manner. You have provided insufficient evidence to refute the actions listed above. **[IF VISTA MEMBER PROVIDES INSUFFICIENT EVIDENCE OR ARGUMENT, ADD ANALYSIS AS APPROPRIATE THAT DESPITE THE EVIDENCE OR ARGUMENT, TERMINATION FOR CAUSE IS STILL THE APPROPRIATE ACTION.]**

Therefore, effective **[ENTER DATE AT LEAST ONE WORK DAY AFTER THE DATE OF THIS LETTER]**, you are hereby terminated from the AmeriCorps VISTA Summer Associate program, and your placement on Administrative Hold status has been discontinued.

Sincerely,

[NAME]

State Program Director, **[STATE]**

Appendix 31A: VISTACase Template

Requesting CSO: Click here to enter text.

SPD: Click here to enter text.

Date CSO Submits This Form to AM (CSO must submit this form to AM for review & comment; AM then submits updated form & any other documentation to OGC, with a copy to VISTAcase@cns.gov): Click here to enter a date.

Date AM Submits This Form (& any other documentation) to OGC: Click here to enter a date.

VISTA Member's Name: Click here to enter text.

VISTA NSPID (or APPID for Applicant/Candidate): Click here to enter text.

VISTA Sponsoring Organization, and VISTA Host Site Organization (if different from Sponsoring Organization): Click here to enter text.

VISTA Member's Dates of Service (Start date of term – scheduled end date of term): Click here to enter a date.

Subject of Case: E.g., proposed termination for cause; opportunity to secure reassignment; medical termination; or VISTA does/does not meet “compelling personal circumstance” standard for pro-rated end-of-service award

Recent/Current Status of the Member:

Is the member currently on Admin. Hold? Click here to enter text.
Effective Date member was placed on Admin. Hold (if applicable): Click here to enter a date.
Expected Length of Admin. Hold (if applicable): Click here to enter text.
Date Sponsor Requested Removal (if applicable): Click here to enter text.
Effective Date of CSO's Removal (if applicable): Click here to enter a date.
Date CSO issued “Admin. Hold Only” letter to VISTA (if applicable): Click here to enter a date.
Living Allowance Payment Status (*Has the member been receiving living allowance payments from the sponsor through a VISTA Program Grant, or from CNCS directly?*): Click here to enter text.

Comments:

Click here to enter text.

Summary of Relevant Events/Communications:

On [DATE]: [ENTER NOTES OF RELEVANT EVENTS/COMMUNICATIONS BETWEEN VISTA AND PROJECT, BETWEEN VISTA AND CSO, ETC.]

TIPS ON ENTRIES

- ENTRIES SHOULD CONTAIN SPECIFIC, RELEVANT INFORMATION ONLY; PLEASE AVOID INCLUDING INFORMATION THAT IS VAGUE OR NOT PERTINENT TO ISSUE(S) IN CASE

- ENTRIES SHOULD BE FACTUAL; PLEASE REFRAIN FROM GIVING OPINIONS OR PERSONAL IMPRESSIONS
- ENTRIES SHOULD BE WRITTEN IN ACTIVE VOICE; PLEASE AVOID PASSIVE VOICE

EXAMPLE OF ENTRY THAT NEEDS WORK: "VINNY VISTA DID NOT RECEIVE A TRANSPORTATION REIMBURSEMENT FROM HIS SPONSOR BY THE DUE DATE, AND I THINK THAT IS BECAUSE THE SPONSOR DISLIKES VINNY AND IS RUNNING OUT OF MONEY";

EXAMPLE OF ACCEPTABLE ENTRY: "THE VISTA SPONSOR, UPLIFT, DID NOT REIMBURSE VINNY VISTA FOR TRANSPORTATION COSTS (\$50.00) BY THE NOVEMBER 1, 2016 DUE DATE; INSTEAD, THE SPONSOR REIMBURSED VINNY ON NOVEMBER 20, 2016 BUT ONLY REIMBURSED HIM 50% OF WHAT HE WAS OWED (I.E., \$25.00).

On [DATE]: [AS NEEDED, DITTO LIKE ABOVE]

On [DATE]: AS NEEDED, DITTO LIKE ABOVE]

...

[ETC. AS NEEDED]

Question(s)/Request(s) of OGC:

Click here to enter text.

Action CSO Recommends:

Click here to enter text.

Additional Comments:

Click here to enter text.

Attachments (listed by file name):

Click here to enter text.

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Appendix 32A: VISTA Opportunity Listing Review Checklist

VISTA Opportunity Listing Review Checklist		
Grantee:	Listing ID:	
Review Criteria	Determination	
I. Opportunity listing accuracy: Is the opportunity listing correctly filled out?		
Is the listing available now?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are program start and end dates correct? Are PSO dates included?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is the term of service full-time or Summer as needed? <i>**Anytime any changes are made to a summer listing the system defaults back to full-time. You must reselect summer each time a modification is made.</i>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do the listing descriptions contain any special characters that need to be updated- such as ¸ - these are usually hyphens or apostrophe's that should be corrected?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is the sponsor currently selecting applications? "Yes" should be selected.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Ensure dates for "accepting apps" are appropriate. Sponsors may underestimate the time needed to find a VISTA.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are the minimum VISTA program benefits included? Childcare assistance, choice of Education Award or stipend, health coverage, relocation, training, living allowance	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Does the state match the program code on page one? (e.g. 00vsaWV000 for West Virginia)	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Are the benefits correctly stated and inclusive only of benefits that can be promoted by VISTA or by the sponsor? (Benefits should not include state, local, or federal benefits such as SNAP.)	Yes <input type="checkbox"/>	No <input type="checkbox"/>
II. Prohibited activities: Do any of the service activities described in the position description appear to fall into any of the areas listed below?		
a. Attempting to influence legislation	Yes <input type="checkbox"/>	No <input type="checkbox"/>
b. Organizing or engaging in protests, petitions, boycotts, or strikes	Yes <input type="checkbox"/>	No <input type="checkbox"/>
c. Assisting, promoting, or deterring union organizing	Yes <input type="checkbox"/>	No <input type="checkbox"/>
d. Impairing existing contracts for services or collective bargaining agreements	Yes <input type="checkbox"/>	No <input type="checkbox"/>
e. Engaging in partisan political activities, or other activities designed to influence the outcome of an election to any public office	Yes <input type="checkbox"/>	No <input type="checkbox"/>
f. Participating in, or endorsing, events or activities that are likely to include advocacy for or against political platforms, political candidates, proposed legislation, or elected officials	Yes <input type="checkbox"/>	No <input type="checkbox"/>
g. 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	Yes <input type="checkbox"/>	No <input type="checkbox"/>
h. Providing a direct benefit to: – a business organized for profit, a labor union, a partisan political organization OR – a nonprofit organization that: Participates in any campaign on behalf of (or in opposition to) any candidate for elective public office, or engages in lobbying efforts to pass or defeat legislation	Yes <input type="checkbox"/>	No <input type="checkbox"/>

III. Opportunity listing content: Do any of the opportunity listing narratives raise concern?			
Does the VISTA member appear to be engaged in direct service, acting in a staff capacity, or displacing or supplanting paid staff?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Are VISTA members supervising AmeriCorps or staff members?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Is the VISTA position clearly connected to the mission of VISTA – elimination of poverty?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Do any of the activities raise other red flags or areas of concern? (Displacement, member safety, appropriateness of activities.) If yes, please contact project for corrective action.	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
IV. Other:			
For updated listings, is the purpose of modification box filled in? If blank enter "updated".	Yes <input type="checkbox"/>	No <input type="checkbox"/>	N/A <input type="checkbox"/>
Comments:			
Staff Reviewer:			Date:

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Appendix 32B: Opportunity Listing Approval—Key Words and Terms to Watch for

This list is not meant to be all-inclusive, but rather an indicator of what may be prohibited VISTA activities. All words and terms listed depend on context.

Words and terms that may indicate a prohibited activity	
Business/profit Candidate, election, campaign, politics, politicians, elected officials Consultant Legislation Lobbying/advocating Organizing Petitions, boycotts, strikes, protests Spiritual programs, missions, prayer, retreats, meditation, faith congregation, worship, religion Union/s, collective bargaining agreements	
Words and terms that may indicate the project is not directly connected to VISTA's mission of alleviating poverty	
Animal welfare/animal observatory/animal protection Environmental conservation/ecosystems/cleanups/waste management	
Words and terms that may indicate direct service	
Direct service/ clients/ caseload Nursing homes/assisted living/hospitals Teaching/instruction/teacher aide Sports/camp/day care	
Other words and terms to watch for	
Lay-offs/ staff shortages	AmeriCorps VISTA members may be displacing a paid employee
Reproductive rights, family planning, pregnancy care, pregnancy center	May warrant double checking to ensure VISTA members are not engaged in prohibited activities; including advocating for or against reproductive choice or abortion.
Staff	May be acting in a staff capacity or replacing/displacing paid staff which are both prohibited.
Supervision/supervise	VISTA members are not allowed to supervise or advise other VISTA members, AmeriCorps or staff members.
Food stamps, EBT, SNAP	May display that the sponsor is promising benefits that are not within the purview of the sponsor to promise.