

November 15, 2010
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FY 2011 Senior Corps Field Guidance



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Fiscal Year 2011 Senior Corps Field Guidance

INTRODUCTION

The *Senior Corps Field Guidance*:

- (a) Constitutes Senior Corps' annual plan for Corporation State Offices;
- (b) Specifies management and reporting expectations, including due dates; and
- (c) Contains Senior Corps' goals and strategies for the year, consistent with the Corporation's overall strategic planning framework. Traditionally, the Senior Corps Annual Field Guidance is set within the context of the Corporation's Strategic Plan. A new Strategic Plan is currently in development. When the plan is finalized, we will issue any updates needed to establish a programmatic framework and any emerging priorities.

The Senior Corps Field Guidance is addressed to State Office staff and presents the blueprint for managing Senior Corps projects. The Field Guidance also supplements the array of tools used by State Offices such as regulations, policies, desk reference, T/TA materials, and other resources and systems.

The FY 2011 Field Guidance has two parts:

Part	Contents and How to Use
1. Senior Corps Fiscal Year 2011 Field Guidance	<p>Contains key information needed by Field Staff to oversee and manage Senior Corps grantees in 2011. Includes:</p> <ul style="list-style-type: none"> • New tools, processes, systems, and materials • Training Guidance • Discussion of and references to continuing priorities <p>This is the primary reference guide and implementation document, and should be read closely and used as a first reference.</p>
2. State Office Tasks in Implementing Senior Corps Goals and Strategies	<p>Contains all State Office required tasks and due dates and thus serves as the primary source for action items and deadlines. It is an attachment to the primary Field Guidance document.</p>

As in previous years, the information formerly included in the *Senior Corps Field Guidance Reference* is now part of an *Annual Supplement* to the Senior Corps Operations Handbooks to be published on-line. The *Annual Supplement* provides grantees important information on current issues, technical assistance resources, program operations, reporting, and other topics of importance and interest to grantees. There are many areas of overlap between the two documents, as many topics are of interest to both audiences. By publishing the Annual Supplement, we hope to answer many questions that grantees may have concerning Senior Corps plans and priorities for FY 2011.

We will notify you when we have published the Annual Supplement so you can familiarize yourself with its content.

AVAILABLE RESOURCES

Senior Corps projects are managed by Corporation State Offices and the Field Financial Management Center (FFMC) staff based on statute, regulations, policy, and guidance.

For budget and planning purposes, this guidance is based on the President's Request for Fiscal Year 2011 of **\$221,100,000** for Senior Corps, which is apportioned as follows:

RSVP: \$ 63,000,000
FGP: \$111,100,000
SCP: \$ 47,000,000

Funding levels may be modified when Congress completes action on the Fiscal Year 2011 appropriations bill.

ACKNOWLEDGEMENTS

As in past years, Senior Corps' FY 2011 Field Guidance reflects input from many sources. Drafts of this Guidance were reviewed by:

- Area Managers
- Corporation State Office and Field Financial Management Center (FFMC) staff
- Headquarters Offices
 - Chief of Program Operations
 - Office of Field Liaison (OFL)
 - Office of General Counsel (OGC)
 - Office of Public Affairs (OPA)
 - Office of Award Oversight and Monitoring (AOM)
 - Strategy Office

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I. Assessments and Monitoring Plans and Visits		
Due Date	Project	Comments/Action
October 2010 through August 2011	State Office conducts monitoring site visits.	State Offices follow approved monitoring plan and eGrants documentation protocols.
July-August 2011	<ul style="list-style-type: none"> • State Office begins monitoring planning processes, including assessments for upcoming fiscal year. • “Overall Programmatic Comments” field is used to address any concerns about the grantee’s ability to meet its established performance measures and/or provide examples of programmatic issues of any kind. 	Guidance and full timeline to be provided by Office of Award Oversight and Monitoring.
II. Other State Office Tasks		
Due Date	Project	Comments/Action
September 2010	National Customer Satisfaction Survey opens to all Senior Corps grantees.	The Office of Field Liaison will send an initial announcement two weeks before the survey begins.
October 18, 2010	Project Profile and Volunteer Activity (PPVA) report opens to grantees.	Instructions were provided.
November 30, 2010	Grantee PPVA submissions due in eGrants.	State Offices begin PPVA review.
January 21, 2011	State Office completes final review of grantee PPVA submissions. If rework is needed, return to grantee; if not, data are final. All final PPVA reports reviewed by State Offices are ready for analysis.	Field Staff PPVA Checklist is available for use in reviewing submissions.
March 18, 2011	State Office submits Fiscal Year 2010 State Funding Report with State Appropriated Funds and Medicaid Waiver Funds.	Template will be provided.
Ongoing for submission to State Offices by grantees March 31, 2011 for centralizing in shared drive	Volunteer Station Rosters: State Offices ensure that Volunteer Station Rosters are submitted by grantees at the time of the grant application. Volunteer Station rosters placed in the shared drive: S:\everyone\Senior Corps\2011 Station Rosters	
Within 45 calendar days of grantee Progress Report, Part I, submission dates	Review each Progress Report, document Performance Measures progress, provide feedback to grantee and copy and paste feedback letter into the “Other Comments” field at the Review Progress Reports screen.	Follow the Review Progress Report Checklist .
July 11-September 15, 2011	Develop prioritized list of projects that can use temporary VSYS.	Distribution of funds for temporary VSYS will depend on funding availability.
TBD	Conduct RSVP re-competition webinar for RSVP grantees.	Content will be developed by the RSVP Working Group.

SECTION I. KEY CHANGES AND WHAT’S NEW IN FY 2011

This section highlights changes and new material in the FY 2011 Senior Corps Field Guidance. The table below contains summaries of changes. The “What’s New in FY 2011” section includes details about new items.

(A) Key Changes in Senior Corps Program Guidance from FY 2010 to FY 2011

Section	Change
Structure of the Field Guidance	<ul style="list-style-type: none"> • New organization/structure of the Field Guidance sections implemented for better organization and flow
Introduction - Available Resources	<ul style="list-style-type: none"> • Based on the President’s Request for FY 2011
Introduction - State Office Tasks	<ul style="list-style-type: none"> • Updated for FY 2011
Section I. What’s New in FY 2011	<ul style="list-style-type: none"> • Description of new additions that are also repeated in the relevant sections of the Field Guidance
Section II. Management and Administrative Responsibilities	<p>Programmatic Elements:</p> <ul style="list-style-type: none"> • Updated Overview of RSVP Re-Competition background and resource materials • Notification Procedure in Potentially Damaging or Dangerous Volunteer Situations • Updated Review of Renewal Applications and Feedback to Grantees • New Changes to the PPVA data elements for RSVP, FGP, and SCP <p>Financial Elements:</p> <ul style="list-style-type: none"> • Authority to Waive the Direct Benefits Ratio (80/20 Rule) • The Fixed Amounts Grants Pilot • The Central Contractor Registration Requirement by OMB • Additional Reminder about Requests to Recycle grants
Section III. Strengthening Performance and Accountability	<ul style="list-style-type: none"> • Anticipating the Customer Satisfaction Survey and Report for 2010
Section IV. Training Guidance and Resource Materials	<ul style="list-style-type: none"> • Updated FY 2011 Training Guidance • Training New RSVP Grantees Awarded in FY 2010
Section V. Raising Awareness and Recognizing Volunteers	<p>Updated sections on:</p> <ul style="list-style-type: none"> • Senior Corps Week • 9/11 National Day of Service and Remembrance • United We Serve • King Day of Service • Volunteer Recognition
Field Guidance Reference (Separate Document)	<ul style="list-style-type: none"> • No longer issued
Program Handbooks FY 2011 Annual Supplement	<ul style="list-style-type: none"> • Replaces “Field Guidance Reference” • Primary Audience: Senior Corps Grantees
Programmatic Priorities	<ul style="list-style-type: none"> • Upon release of the Strategic Plan, Senior Corps will release its Strategic Framework. The framework will align with the Strategic Plan.

B. What's New in FY 2011

This section summarizes new items in FY 2011. Detailed information is found in the appropriate sections of the Field Guidance, as noted in the “reference” accompanying each item.

(1) Authority to Waive Direct Benefits Ratio (80/20 Rule)

On August 20, 2010, the Corporation for National and Community Service issued a final rule implementing changes in the National Service Trust and other provisions as directed by the Serve America Act.

Changes specific to Senior Corps allow for the waiver of direct benefit ratio requirements (also known as the “80/20 Rule”) for Senior Companion and Foster Grandparent grantees meeting waiver requirements as specified in regulations, effective September 20, 2010.

Reference: Section II. B. Management and Administrative Responsibilities:
Financial Elements

(2) RSVP Re-Competition

The Serve America Act amendments to the Domestic Volunteer Service Act (DVSA) require re-competition of existing RSVP grants beginning in FY 2013. The first phase of RSVP re-competition is underway.

Reference: Section II. A. Management and Administrative Responsibilities:
Programmatic Elements

(3) Notification Procedure in Potentially Damaging or Dangerous Volunteer Situations

Cases in which Senior Corps volunteers have allegedly participated in inappropriate behavior while on duty are rare, but not unprecedented. When there is such an occurrence or allegation, it is critical that Senior Corps Headquarters is aware so that we can brief and prepare Corporation senior staff and our External Relations Office who may be asked for questions or comments.

Reference: Section II. A. Management and Administrative Responsibilities:
Programmatic Elements

(4) Progress Reporting: Change in Frequency

The shift to annual Progress Reports for Senior Corps grantees was effective with the 4th quarter 2010 grant cycle.

Reference: Section II. A. Management and Administrative Responsibilities:
Programmatic Elements

(5) Central Contractor Registration Required

Effective October 1, 2010, new guidance from the Office of Management and Budget (OMB) requires all federal government grantees to register at the Central Contractor Registration (CCR) Database. Registration must be in place to receive a federal assistance award from the Corporation for National and Community Service. The requirement is included in the terms and conditions of each grant.

Reference: Section II. B. Management and Administrative Responsibilities:
Financial Elements

(6) Fixed Amount Grants Pilot: Foster Grandparent Program and Senior Companion Program

The Serve America Act authorized the Corporation for National and Community Service (the Corporation) to conduct a Fixed Amount Grants pilot in 2011 for the Senior Companion Program (SCP) and Foster Grandparent Program (FGP). Fixed amount grants allow grantees to apply for a standard unit cost per Volunteer Service Year (VSY).

Reference: Section II. B. Management and Administrative Responsibilities:
Financial Elements

(7) Training for new RSVP Grantees Awarded in FY 2010

In FY 2010, the Corporation awarded new RSVP project grants to 18 organizations, including existing and new sponsors. Pending available resources, Senior Corps intends to convene a two-day New Project Training in Washington, DC during the 2nd quarter of FY 2011.

Reference: Section IV. Training Guidance

SECTION II. MANAGEMENT AND ADMINISTRATIVE RESPONSIBILITIES

A. Programmatic Elements

(1) RSVP Re-Competition

The first phase of RSVP re-competition, scheduled to begin in FY 2013, is underway. As specified in the Serve America Act amendments to the Domestic Volunteer Service Act (DVSA), the Corporation started the required pre-competition Evaluation Phase. In conjunction with the RSVP Re-competition Working Group, we have:

- Designed the template and overall structure for the **RSVP Evaluation Reports**. The first set of reports for the grantees with “08” grant numbers are scheduled for distribution in November 2010. The next set of reports released will be for grantees with “10” grant numbers, and finally, for grantees with “09” grant numbers. Each Evaluation Report will contain information about the grantees strengths, suggested areas of improvement, and recommended training and technical assistance resources. State staff will receive a courtesy copy of their grantees’ Evaluation Reports when they are sent.
- Information in the Evaluation Report is based on:
 - The grantee’s most recent renewal application;
 - The Corporation’s assessment of application quality, based on documentation provided after a review by two Corporation State Office staff;
 - The Fiscal Year 2010 Monitoring Planning Assessment, completed by the Corporation State Program Officer and the Grant Officer at the Field Financial Management Center; and
 - A checklist of recommended TTA provided by the grantee’s Program Officer.

As the “08” RSVP project directors and sponsors receive their evaluation reports in October, we anticipate that they will seek guidance from their State Office on how to strengthen areas for improvement and generally prepare to be competitive.

State Offices should be prepared to provide guidance and feedback as is typically offered to grantees in need of T/TA.

- Completed and disseminated the “**Community Stakeholder Survey**” to all RSVP grantees, including both sponsor and project director. The survey was developed to meet a requirement of the Serve America Act to give each RSVP project a standard tool to assess strengths and possible areas of improvement in building meaningful, interactive community partnerships and identifying and addressing community needs from the perspective of the project’s community stakeholders. The results of the survey are for the use of the RSVP grantee and will not factor into evaluation of applications received during re-competition of RSVP grants beginning in 2013.

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We anticipate that as grantees receive the survey feedback from their community partners, they will seek guidance and suggestions from the State Office on how to strengthen areas for improvement around meeting community need and fostering community partnerships. We ask that you please provide guidance as you typically would when a grantee needs technical assistance on an issue.

The Community Stakeholder Survey can be used by RSVP grantees as the “annual assessment” for the year or years in which it is administered.

A list of TTA resources by category is being compiled and will be posted as an addendum to the RSVP Re-Competition Online Resource Guide in the near future. All state staff will also receive a copy of the list via email.

(2) Notification Procedure in Potentially Damaging or Dangerous Volunteer Situations

Cases in which Senior Corps volunteers have allegedly participated in inappropriate behavior while on duty are rare, but not unprecedented. When there is such an occurrence or allegation, it is critical that Senior Corps Headquarters is aware so that we can brief and prepare Corporation senior staff and our External Relations Office who may be asked for questions or comments.

Examples of inappropriate behavior on the part of a Senior Corps volunteer include:

- Criminal behavior that results in the volunteer’s arrest, such as inappropriate interaction with a client or client family member;
- Action by a Senior Corps volunteer, including accidental, resulting in injury to or death of the client; or
- Action by a Senior Corps volunteer, including accidental, resulting in injury to or death of another volunteer.

Beginning in FY 2011, we are implementing a new notification procedure as detailed below.

As soon as any State Office staff learns of a possible situation involving a volunteer:

- (a) Please immediately notify Senior Corps Headquarters of the incident. Please email Senior Corps Director Erwin Tan (etan@cns.gov) and Angela Roberts (aroberts@cns.gov) directly, with a copy to the State Director and Area Manager.
- (b) Please include as much information as is available in the notification, such as:
 - A description of the incident;
 - The grantee, project name, city, and state;
 - A brief description of steps, if any, the State Office took when learning of the incident; and/or
 - Any other information known, such as press or media reports.
- (c) Please be available to respond to follow up requests for information or to conduct additional outreach and information gathering with the grantee.

(3) Annual Progress Reporting/Semi-Annual Demographics Reporting

As of July 1, 2010, which is the Senior Corps 4th quarter FY 2010 grant portfolio, the Progress Report is submitted annually by grantees (previously semi-annually). SCP and FGP continue to report information on the Demographics Tab in eGrants semi-annually. Notices of Grant Award specify the modified reporting frequency.

(4) Review of Renewal Applications and Feedback to Grantees

In 2008, RSVP began to rigorously review renewal applications. Renewal applications only include grants in the first year of the three-year grant cycle. For each RSVP renewal application, we pair the assigned program officer with a second reviewer from outside the grantee's cluster to perform the review. Reviewers assess the applications using a standardized application review checklist located at: S:\everyone\Senior Corps\2011 Renewals Process. Reviewers then enter their ratings into eGrants. The assigned program officer consults with the area manager to finalize feedback letters to grantees. Feedback letters are adapted from the feedback letter template, which is updated annually. The assigned program officer saves a copy of the feedback letter in: S:\everyone\Senior Corps\RSVP Recomp. The feedback letters based on review results are vital tools not only to provide grantees with a T/TA plan, but also to help grantees prepare for the RSVP Recomp. Starting in 2009, we placed the renewal letter templates for RSVP, FGP and SCP in the Renewals Process folder. We will continue this practice in FY 2011.

2009 Letters: S:\everyone\Senior Corps\RSVP Recomp\2009 RSVP Renewal Letters

2010 Letters: S:\everyone\Senior Corps\RSVP Recomp\2010 RSVP Renewal Letters

2011 Letters: S:\everyone\Senior Corps\RSVP Recomp\2011 RSVP Renewal Letters

(5) Project Profile and Volunteer Activity (PPVA) National Data Collection

In early FY 2011, Senior Corps will launch its major annual national data collection initiative: the Project Profile and Volunteer Activity (PPVA) survey. As in the past, submissions from individual projects will be aggregated to present national and regional snapshots of project activities, clients served, sponsor and volunteer station profiles, volunteer demographics and trends, and other aspects of project operations. The PPVA survey is currently incorporated into eGrants as the Progress Report Data Supplement.

State Offices are responsible for reviewing PPVA submissions from their Senior Corps grantees for accuracy and completeness. The key FY 2011 PPVA data element changes are outlined below.

Instructions are online here:

http://www.seniorcorps.gov/for_organizations/manage/index.asp

For RSVP:

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- Replaced “total # of children in foster care served” with “total number of veterans served.”

For FGP and SCP:

FGP and SCP questions regarding age and income eligibility were changed according to the Serve America Act requirements:

- “# of volunteers able to enroll due to age set to 55”
- “# of volunteers able to enroll due to income eligibility change”

For SCP:

Added new questions focused on service by and to veterans:

- “# of veterans served”
- “# of veterans serving as Senior Companions:

For FGP:

- Replaced “total # of children in foster care served” with “total # of children of military families served

We realize that grantees did not have time to establish data systems to collect information on service to veterans and military families. Grantees who can report should be encouraged to do so. Those who cannot should set up systems to report on these data elements in the FY 2011 PPVA.

For more information, please see:

- Page 6 - “2011 Calendar of Reports and Due Dates” and
- Part II - State Office Tasks in Implementing Key Senior Corps Goals and Strategies for FY 2011

(6) Designation of Authorized Representative in eGrants

Field staff are asked to continue to review whether the project director and the legal applicant’s authorized representative for each of their assigned grants are the same person. Normally they should not be the same, as this indicates a potential lack of controls on the part of the grantee, since the same person is completing, approving, and committing the organization to implement the project as proposed. When this is found to be the case, please contact the sponsor executive or the person overseeing project activities to explain the concern and explore alternative ways to ensure eGrants submissions reflect appropriate oversight.

(7) Assessment, Monitoring and Documentation - Overview of Policies and Procedures

for FY 2011

Guidance for Corporation staff on planning assessments and monitoring in FY 2011 is posted at the Office of Award Oversight and Monitoring [intranet site](#).

State Office program managers are expected to use the template letters developed for compliance monitoring feedback to ensure consistency in official correspondence to grantees. Template letters are located on the Intranet site at the Office of Field Liaison (OFL) and Award Oversight and Monitoring (AOM) sites.

State Office program managers should continue to review and become familiar with these Corporation-wide policies and procedures as they apply to Senior Corps grants and should refer to these documents and the accompanying due dates when:

- completing monitoring planning assessments,
- scheduling site visits,
- documenting actions such as pre-visit notifications, date visited, follow-up correspondence,
- transmitting site visit letters, and
- conditioning/holding grants for significantly late PPRs or FFRs.

(8) Review of Grantee Progress Reports

Within 45 calendar days of grantee submission, review the Progress Report and fill out the Corporation staff review screen (Review Progress Reports) in eGrants, following the *Review Progress Report Checklist*.

B. Financial Elements

(1) Authority to Waive Direct Benefits Ratio (80/20 Rule)

(a) Overview

On August 20, 2010, the Corporation for National and Community Service issued a final rule implementing changes in the National Service Trust and other provisions as directed by the Serve America Act.

The final rule was developed after a thorough review of extensive public input. It makes a number of changes that will further our goal of expanding opportunities for Americans to serve by increasing incentives, expanding eligibility, and improving the benefits for those who answer the call to serve.

Changes specific to Senior Corps allow for the waiver of direct benefit ratio requirements (also known as the “80/20 Rule”) for Senior Companion and Foster Grandparent grantees meeting waiver requirements as specified in regulations.

The ability to waive the 80/20 direct benefits ratio became effective **September 20, 2010**.

No blanket waivers are authorized. Waivers are considered and reviewed on a case-by-case basis.

(b) Authority to Waive

The authority citation for this rule regarding Part 2551 Senior Companion Program and Part 2552 Foster Grandparent Program is 42 U.S.C. 4950 et seq.; 42 U.S.C. 12651b-12651d; E.O. 13331, 69 FR 9911.

Foster Grandparent Program:

http://www.nationalservice.gov/help/serveact_trust/2010_Trust_Rule.htm

Senior Companion Program:

http://www.nationalservice.gov/help/serveact_trust/2010_Trust_Rule.htm

(c) Circumstances Permitting Waiver of the 80/20 Rule:

- Initial difficulties in the development of local funding sources during the first three years of operations;
- An economic downturn, the occurrence of a natural disaster, or similar events in the service area that severely restrict or reduce sources of local funding support;
or

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- The unexpected discontinuation of local support from one or more sources that a project has relied on for a period of years.

(d) Requesting a Waiver of the 80/20 Rule:

The process for requesting a waiver for the cost reimbursement requirement is as follows:

- The grantee submits a written request for a waiver to the Corporation's State Program Director.
- The written request should be submitted at the time of the grant renewal application, or at the earliest time the grantee is aware of possible impact. The written request must include:
 - Why the requirement will not be or was not met.
 - What specific attempts were made to achieve the required ratio.
 - A plan to provide the required ratio in the current grant period.
 - The State Program Director, in consultation with the FPMC grants officer, reviews the request and, if there areas of disagreement, works with the Area Manager on solutions.
 - If there is concurrence on approval, the request should be forwarded to Area Managers for review and approval.
 - The Area Manager should provide a copy of the approval to the Senior Corps headquarters office.

REGULATIONS LANGUAGE - PART 2551 – SENIOR COMPANION PROGRAM

The authority citation for Part 2551 continues to read as follows:

Authority: 42 U.S.C. 4950 et seq.; 42 U.S.C. 12651b-12651d; E.O. 13331, 69 FR 9911.

Amend § 2551.92 by revising paragraph (e) to read as follows:

§ 2551.92 [Amended]

(e) How are Senior Companion cost reimbursements budgeted?

- (1) Except as provided in (2), the total of cost reimbursements for Senior Companions, including stipends, insurance, transportation, meals, physical examinations, and recognition, shall be a sum equal to at least 80 percent of the amount of the federal share of the grant award. Federal, required non-Federal, and excess non-federal resources can be used to make up the amount allotted for cost reimbursements.
- (2) The Corporation may allow exceptions to the 80 percent cost reimbursement requirement in cases of demonstrated need such as:
 - (A) Initial difficulties in the development of local funding sources during the first three years of operations;
 - (B) An economic downturn, the occurrence of a natural disaster, or similar events in the service area that severely restrict or reduce sources of local funding support; or
 - (C) The unexpected discontinuation of local support from one or more sources that a project has

relied on for a period of years.

REGULATIONS LANGUAGE: PART 2552 – FOSTER GRANDPARENT PROGRAM

The authority citation for Part 2552 continues to read as follows:

Authority: 42 U.S.C. 4950 et seq.; 42 U.S.C. 12651b-12651d; E.O. 13331, 69 FR 9911.

Amend § 2552.92 by revising paragraph (e) to read as follows:

§ 2552.92 [Amended]

(e) *How are Foster Grandparent cost reimbursements budgeted?*

(1) Except as provided in (2), the total of cost reimbursements for Foster Grandparents, including stipends, insurance, transportation, meals, physical examinations, and recognition, shall be a sum equal to at least 80 percent of the amount of the federal share of the grant award. Federal, required non-Federal, and excess non-federal resources can be used to make up the amount allotted for cost reimbursements.

(2) The Corporation may allow exceptions to the 80 percent cost reimbursement requirement in cases of demonstrated need such as:

(A) Initial difficulties in the development of local funding sources during the first three years of operations; or

(B) An economic downturn, the occurrence of a natural disaster, or similar events in the service area that severely restrict or reduce sources of local funding support; or

(C) The unexpected discontinuation of local support from one or more sources that a project has relied on for a period of years.

(2) FGP and SCP Volunteer Service Years (VSYS) Management

a. [Policy 850, Management of Volunteer Service Years in FGP and SCP Grants](#), as revised effective October 1, 2005, is available to Corporation staff at the Policies Page on the Corporation's Intranet. State Offices, working with the FFMC, are expected to monitor closely all FGP and SCP projects in order to facilitate early identification of grantees that may not be able to use all of their VSYS. Where appropriate, staff should encourage temporary relinquishments, as described in item 2.b, below.

b. **Temporary Relinquishments.** As of FY 2006, Senior Corps established a uniform approach to temporary VSYS relinquishments, described in "[Q&A on Temporary Relinquishment and Reallocation of FGP and SCP VSYS](#)". These procedures remain in effect and are intended to encourage FGP and SCP grantees to make available VSYS that they are unable to use during the current budget year for reallocation to grantees that can effectively use them within their own current budget year. Temporarily relinquishing VSYS does not affect the VSYS level for the subsequent year.

c. **End-of-Year Prioritized Lists.** During the time period of June 11 through September 15, 2011, State Offices are asked to develop and share with Senior Corps headquarters prioritized lists of SCP and FGP grantees that can effectively utilize additional temporary VSYS funding that may become available towards the end of the fiscal year, September 30. Each Area Manager will establish the process to forward the requests to

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Senior Corps headquarters. In the final weeks of the fiscal year, State Offices should ensure that program managers are available, or authority is delegated, to process amendments temporarily allocating VSY funding as authorization to do so is communicated from Senior Corps headquarters.

d. Recycling Requests. Please remember that all requests for recycling of Senior Corps grants **must be approved by Senior Corps headquarters.**

(3) Central Contractor Registration Required

Effective October 1, 2010, new guidance from the Office of Management and Budget (OMB) requires all federal government grantees to register at the Central Contractor Registration (CCR) Database. Registration must be in place to receive a federal assistance award from the Corporation for National and Community Service. The requirement is included in the terms and conditions of each grant.

Universal Identifier and Central Contractor Registration

The Office of Management and Budget recently added new regulations to 2 CFR Part 25 requiring all applicants for federal funds and existing grantees to obtain a Data Universal Numbering System (DUNS) Number and maintain current registrations with the Central Contractor Registration (CCR). If grantees are not already registered in the CCR (or have an expired registration), they should begin activating their accounts immediately. As of October 1, 2010, CNCS can not award grants to organizations that are not in the CCR or have an expired registration.

Registering in the Central Contractor Registration (CCR):

CCR is the primary registrant database for the U.S. Federal Government. CCR collects, validates, stores, and disseminates data in support of federal agency contracts, grant awards, cooperative agreements, and other forms of federal assistance. Grantees can register online at <http://www.ccr.gov>. Registration takes approximately one hour to complete, depending on the size of your organization. A DUNS number is required to register.

To complete the registration process, grantees must submit detailed information on the sponsor organization in various categories relevant to federal procurement and financial transactions:

- General Information, such as organization name, EIN, DUNS, location, income, and number of employees.
- Corporate Information, such as organization type (i.e., state government, non-profit).
- Financial Information, such as financial institution, bank account numbers, and credit card information.
- Point of Contact Information, such as primary and alternate points of contact.

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Specific requirements and detailed instructions on how to register are available in the CCR User's Guide (<https://www.bpn.gov/ccr/handbook.aspx>). Grantees should review the guide before beginning the registration process as it identifies the required fields and provides information to assist with gathering the necessary information.

Once registration is completed, it will take 3 to 5 business days to validate and process. Grantees will receive an email notice from CCR when the registration becomes active. This is a one-time registration. However, grantees must update or renew their registration at least once per year to maintain an active status. CCR will send a renewal reminder 30 days before each registration expires with instructions for completing the renewal process.

Maintaining or Requesting a Data Universal Numbering System (DUNS) Number:

The DUNS number is a unique nine-character identification number provided by the commercial company Dun & Bradstreet (D&B). CCR now automatically inputs information from your DUNS number registration directly from Dun & Bradstreet database. If grantees previously registered for a DUNS number, they should review the sponsor organization's information on file at Dun & Bradstreet to ensure that it is still accurate. Registration information can be reviewed and updated on-line at <http://fedgov.dnb.com/webform> or by contacting the D&B Government Customer Response Center at 1-866-705-5711. This is the same contact information to use if requesting a new DUNS number.

(4) Fixed Amount Grants Pilot: Foster Grandparent Program and Senior Companion Program

The Serve America Act authorized the Corporation for National and Community Service (the Corporation) to conduct a Fixed Amount Grants pilot in 2011 for the Senior Companion Program (SCP) and Foster Grandparent Program (FGP). Fixed amount grants allow grantees to apply for a standard unit cost per Volunteer Service Year (VSY).

The total amount of a fixed amount grant must be significantly less than the cost of running a project. Grantees must pay the specified cost reimbursements and follow the FGP and SCP regulations, as stipulated in the terms and conditions of the grant award.

The maximum levels for 2011 fixed amount grants pilot are shown in the table below:

Program	Maximum Federal Contribution per VSY
Foster Grandparent Program	\$4,600
Senior Companion Program	\$4,550

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Advantages of a fixed amount grant are:

- Cost Principles do not apply.
- No tracking or documentation of Corporation and non-Corporation support is required.
- Line Item budgets are not required during application process.
- Limited financial reporting to the Corporation is required; the semi-annual FFR (SF 425) is not required. Only the final FFR is required at the end of the three year grant.

However, if the approved VSY level is not achieved, but the entire grant has been drawn down, the grantee is required to repay the Corporation.

Online resources are available here:

http://www.seniorcorps.gov/pdf/10_0909_senior_corps_fixed_grant_ppt.pdf

http://www.seniorcorps.gov/pdf/10_0909_senior_corps_fixed_grant_faq.pdf

The FY 2011 Fixed Amount Grants Pilot for FGP and SCP began for the 2nd quarter of FY 2011. Only FGP and SCP grantees in “good standing,” as determined by VSY production, programmatic success and compliance, and who are entering their renewal year in FY 2011, are eligible. The pilot will continue in FY 2011 for the 3rd and 4th quarter FGP and SCP grants that satisfy these requirements.

The role of State Staff in implementing the Fixed Amount Grants Pilot is to help facilitate coordinated participation by eligible grantees. Specifically:

- To work with the FFMC grants officers, as needed to help identify grantees that are candidates to participate in the Pilot;
- To work with the FFMC grants officers, as needed, to ensure the correct renewal notification letter(s) are sent to eligible candidates;
- To continue programmatic oversight of grantees participating in the Pilot.

SECTION III. STRENGTHENING PERFORMANCE AND ACCOUNTABILITY

The Corporation continues to emphasize accountability and performance of its programs. Performance measurement is important both as a management tool and as a means to communicate impact of the project and the volunteers.

As in previous years, the two dimensions of the Corporation’s performance measurement initiative are:

- (1) *Accountability of Senior Corps projects at the local level*, a process now familiar to most grantees, that builds on Programming for Impact and allows grantees to select their own local performance measures; and
- (2) *National measures of program performance*, a Corporation-wide process that results in national measures of program performance, which are reflected in the Corporation’s annual Performance and Accountability Report to Congress. As part of a government-wide pilot program, the most recent Performance and Accountability Report was incorporated in the Corporation’s FY 2011 Budget Justification.

**Accounting for All Enrolled
Volunteers in Work Plans**

The Corporation allows work plans to include varying degrees of detail, depending on whether the volunteer activities are included in outcome/impact –based work plans or other work plans.

However, *in every RSVP, FGP, and SCP project, all enrolled volunteers must be accounted for in work plans.*

A. Performance Measurement at the Grantee Level

In FY 2011, Senior Corps will continue its established system of grantee performance measures and outcome-based programming/reporting. Grantees needing help in understanding the Corporation’s expectations concerning grantee performance measurement may be referred to the instructions for the Senior Corps Grant Application and the [Senior Corps Toolkit: Performance Measurement Initiative](#).

State staff and grantees are encouraged to review and use the new “Program Builder” tool developed for Senior Corps and AmeriCorps by Project STAR: <http://linhost1.jbsinternational.com/pmbuilder/index.php>. Program Builder is an online, interactive tool to help AmeriCorps and Senior Corps programs develop performance measures by choosing from a series of drop-down menus, creating the work plan, saving the Word document, customizing it, and – when ready – copying and pasting into eGrants.

• Optional Standard Work Plans and Performance Measurement Tools for Senior Companion, Foster Grandparent, and RSVP Projects

SCP: In 2006, a working group was formed which included a State Program Director and several Senior Companion project directors. With the assistance of Project Star, the group

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developed the following set of **optional** work plans and performance measurement tools available at The Resource Center to track and capture outcomes:

- [In Home Care Service Activity](#)
- [Companionship / Outreach Service Activity](#)
- [Respite Care Service Activity](#)

Use of these tools, available online at <http://www.nationalserviceresources.org/star/sc-workplan-optional>, can streamline the efforts of Senior Companion projects, as all of the materials and indicators are pre-validated and reliable. RSVP projects can also adapt these materials for volunteers engaged in similar activities.

FGP: In the summer of 2007, a similar process began, where a State Program Director facilitated a working group of FGP project directors to develop the following optional work plans and performance measure tools for the Foster Grandparent Program, which were reviewed by the NAFGPD and are now available in final form at <http://nationalserviceresources.org/star/sc-option-foster>.

- [Preschool Activity](#)
- [Head Start Activity](#)
- [Elementary School Literacy Activity](#)
- [Mentoring Activity](#)

RSVP projects with volunteers engaged in similar activities may also adapt these materials for their purposes.

State Office program managers are encouraged to review these tools and, as applicable, encourage Senior Companion, Foster Grandparent, and RSVP projects to consider adopting these new work plans, templates, and instruments.

- **Optional Work Plans and Instruments for Measuring Benefits to Senior Corps Volunteers**

Senior Corps projects not only address critical community needs, they also benefit the volunteers themselves. The packets listed below were developed over the past year by a working group of RSVP, Senior Companion, and Foster Grandparent program directors, Senior Corps staff, and Project STAR in order to provide Senior Corps project directors with materials to assist with measuring the benefits of volunteering. Included in each packet is a sample work plan, survey, and instructions for administering the survey and summarizing the data.

These work plans are not required and cannot be substituted for the required impact and non-impact work plans. However, project directors can use feedback collected from volunteers to improve their project by identifying strengths and areas for improvement in volunteer recruitment, training, placement, and retention. In addition,

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positive feedback from volunteers can also be used to build stakeholder support for projects. Because these work plans are not part of regular work plan requirements, each of the four work plans identifies only one outcome.

- [Increase in Knowledge Outcome](#)
- [Volunteer Satisfaction Outcome](#)
- [Mental Health Outcome](#)

- [Physical Health Outcome](#)

B. National Surveys and Studies

Customer Satisfaction Survey and Report for 2010

Through this online survey, Senior Corps grantees may provide feedback on the quality of customer service that they receive from the Corporation. A third party firm, the CFI Group USA, LLC, conducts the Customer Satisfaction Survey. The results are a source of data for national reporting and provide vital feedback to the Corporation about successes and areas for improvement. For the 2009 survey, reported in FY 2010, the overall satisfaction score of Senior Corps grantees with services provided by the Corporation held steady at 72, three points above the Federal average of 69 points. Data collection for 2010 began in September-October of 2010, with results anticipated by the 3rd quarter of FY 2011.

As in previous years, State Offices should encourage their grantees to participate in the survey. The Office of Field Liaison will send an initial announcement about the survey two weeks before the survey begins and periodic updates throughout the data collection period.

SECTION IV. TRAINING GUIDANCE

(A) Overview

Training and technical assistance (T/TA) is a strategy to enhance the management and programmatic skills of Senior Corps grantees and are delivered through three vehicles:

- (1) **Face-to-face.** Training events that provide workshop sessions, direct interaction with Corporation staff and subject matter specialists, and networking with peers and colleagues.
- (2) **Online distance learning such as webinars, tutorials, and in some cases, one-on-one coaching.** [The Resource Center](#) is the online destination for tools and training resources, and is available to Corporation staff as well as grantees. Users can search and access online training tools, such as Performance Measures tutorials or financial management webinars.

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- (3) **Online Materials.** [The Resource Center](#) also has an extensive library of materials, including effective practices, toolkits, sample work plans, event calendars, and a catalogue of printed publications and videos available for loan. The Resource Center also serves as a learning exchange where individual projects can share their innovations and effective practices with others and find content in many formats developed by the Corporation's past and current T/TA providers.

(B) FY 2011 National Conference on Volunteering and Service

The **2011 National Conference on Volunteering and Service (NCVS)**, convening June 6 – 8, 2011 in New Orleans, Louisiana, is the official training event for Senior Corps grantees in FY 2011. Senior Corps grantees should be encouraged to attend this training.

Budgeting Guidance

- (a) Grant funds may be used to budget for one or two staff –the Project Director and the sponsor's Executive Director or designee – to attend the NCVS in New Orleans.
- (b) Budget constraints prohibit the Corporation from providing supplemental grant augmentations to support the conference. Grantees should estimate \$1,200 to \$1,500 per person to attend the NCVS and list these funds in the long-distance travel line item of their budget.
- (c) In lieu of attending the National Conference, grantees may identify and attend a different training event directly related to accomplishing the goals of the Senior Corps grant. This training must be approved by the State Office.
- (d) Any special situations should be brought to the attention of the Area Manager for review with Senior Corps headquarters.

Logistical Guidance

As conference details concerning venue, hotels, etc., become available, they will be shared with State Offices and Senior Corps grantees.

RSVP Grant Re-competition Workshop at the 2011 National Conference

The Corporation will offer a workshop focused on RSVP re-competition during the 2011 National Conference. The session will be available in multiple workshop time blocks and is strongly recommended for all RSVP grantee staff attending the conference. Corporation State Office and FFMC staff attending the conference must plan to attend one of the sessions. Online materials will be available for RSVP grantees unable to attend. Other training materials specifically for State Staff will be developed, including a webinar and information guides. All State Office staff will be asked to use staff training materials to conduct at least one webinar/information session with their RSVP grantees during FY 2011.

New Project Director Training

In 2011, as in recent past years, New Project Director Training will be offered as a pre-conference event at the National Conference. The New Project Director Training is specifically designed to help new project directors learn and understand key aspects of their roles, as directors of their projects and as staff of a federal grantee. In 2011, all new Senior Corps project directors, defined as those who started on their jobs after June 1, 2010, should make attending the National Conference, including the pre-con New Project Director Training, the highest training priority. If any new project directors in your state determine that they cannot attend, you must notify Senior Corps Headquarters.

(C). Training New RSVP Grantees Awarded in FY 2010

In FY 2010, the Corporation awarded new RSVP project grants to 18 organizations, including existing and new sponsors. Pending available resources, Senior Corps intends to convene a two-day New Project Training in Washington, DC during the 2nd quarter of FY 2011. The purpose of the training is to help new project directors and other sponsor staff to learn basics of RSVP project operations and to facilitate a peer network among the attendees. The new project directors will also be expected to attend the New Project Director Training at the National Conference on Volunteering and Service in June, 2011.

We will share more information about this training, including roles for State Staff who manage the new RSVP grantees, in the near future.

(D) Trainers and Training Materials

Trainers from the national T/TA providers will only be available at the 2011 National Conference in New Orleans, Louisiana, which is the official training event for all Senior Corps grantees.

For all other training events, we anticipate the following:

- **Corporation State Office Staff as Trainers:** Senior Corps is confident that state staff can provide training that grantees need to comply with Federal regulations and Senior Corps policies. National T/TA providers will develop training materials, including PowerPoint presentations, session guidelines, handouts and sample exercises for field staff to use. All materials developed by the national providers will include training instructions.
- **Experienced Senior Corps Project Directors:** Some project directors have developed high quality programmatic and volunteer management sessions and materials to present effective practices.
- **Other:** National and community organizations or government agencies can be sources of excellent grantee training. State offices can propose such opportunities to the Area Manager for approval.

(E) Other Resources and Information for Senior Corps Grantees

- **The Resource Center**, located at www.nationalservice.gov/resources, is the repository for T/TA resources for Senior Corps and other CNCS programs. The site provides a user-friendly experience and incorporates a robust search engine. In particular, users can select broad search parameters from the home page, such as “Senior Corps,” and then access resources specific to the audience or needs. A new [video orientation](#) to the website for Corporation staff and grantees is available at the Resource Center home page. For assistance with the website, grantees may call the Resource Center at 800-860-2684.

The Resource Center contains [online training tools](#), [event calendars](#), and [effective practices](#), as well as a [catalogue](#) of print publications and videos available on loan. The Resource Center’s content is generated by a network of [T/TA providers](#) who serve the needs of volunteer and service programs. In addition, the Resource Center serves as a learning exchange where individual programs can share their innovations and effective practices with others.

- **National Conference Materials**

At the 2010, 2009, and 2008 National Conferences on Volunteering and Service, a wide range of workshops, forums, and other sessions were presented.

2010 Conference: Presentations and other materials from many of the sessions are posted at: <http://www.volunteeringandservice.org/resources-sessions.cfm>. Look for the links under “Files and Handouts.”

2009 Conference: Presentations and other materials from many of the sessions are posted at www.volunteeringandservice.org/review/resources.cfm. Look for the links under “Files and Handouts.”

2008 Conference: The extensive Senior Corps-specific resources from this conference have been posted at <http://nationalserviceresources.org/sc-conference-2008>.

(F) Reporting T/TA Needs on the Progress Report and Follow-up

- Senior Corps grantees report T/TA needs in the narrative section of the Project Progress Report (PPR).
- The Corporation Program Officer should:
 - a) Follow up on grantee T/TA requests by reviewing with the grantee the T/TA needs requested on the PPR.
 - b) Help connect the grantee to the appropriate T/TA resource(s).
 - c) Note follow-up actions taken in the “Review Progress Report” screen in eGrants, accessed by clicking on the Corporation button at the “Enter/Review PR” screen.

(G) Identifying T/TA Needs Based on Renewal Applications

State Offices can also help grantees assess their T/TA needs through the renewal application review process. An outcome of this process is a TA plan developed by the Corporation's State Office and discussed with the grantee. As the grantee takes advantage of T/TA resources, they are expected to report on the results in the PPR.

(H) Program Development Assistance and Training Funds (PDAT)

The Corporation expects all national service programs to collaborate at the local level. State Commissions are expected to communicate and coordinate with Senior Corps sites. Likewise, Senior Corps projects, under the direction of the state office, are expected to cooperate and participate in joint training ventures designed with input from them by State Commissions, state education agencies and Corporation state offices and to use grant funds as appropriate to support cross-stream training events and activities.

The activities proposed must be consistent with these instructions, the Administrative / PDAT / Disability Provisions, and with the State Commission's training plan. The Corporation State Director or designee is expected to work with the State Commission and the State Education Agency to conduct joint planning and implementation of cross-program training events.

To the extent allowed by grant provisions and to the extent available, PDAT funds may be used to strengthen infrastructure that supports collaboration and that uses statewide events as one of the primary vehicles for training across national service programs.

Cross-program events remain a training option for Senior Corps grantees. The Senior Corps grantee training guidance allows the use of Senior Corps funds, at the discretion of the Area Manager, to support cross-program training. Senior Corps grantees may use grant funds to support travel, meals, registration fees, etc.

(I) Disability Funds

Commissions may use Disability funds to provide reasonable accommodations for Senior Corps participants, and for outreach and support activities that increase the number of people with disabilities engaged in service for all national service participants.

Disability Placement Grants (Disability) funds can be used for Senior Corps volunteers and may be used for outreach and support activities that increase the number of people with disabilities engaged in service for all national service participants.

**SECTION V. RAISING AWARENESS AND RECOGNIZING CONTRIBUTIONS OF SENIOR CORPS
VOLUNTEERS**

(A) Senior Corps Week

Senior Corps Week debuted in FY 2010, with the first Senior Corps designated as September 21 through 24, 2010. The week-long initiative was designed to create awareness and to recognize and thank community partners and volunteers for the impact they make in their communities.

Senior Corps Week incorporates a focused, concentrated marketing and communications plan and outreach activities to increase awareness and recognition of seniors answering the President's call to service.

The dates for the 2nd annual Senior Corps Week are not yet determined. When we have additional information, we will share it with you, along with updated information about materials or products to help promote senior volunteering.

State Offices are asked to participate in Senior Corps Week events sponsored by grantees to the extent possible, within budgetary and other practical constraints.

(B) King Day of Service:

- King Day of Service – Participation in the Martin Luther King, Jr. Day of Service has grown every year since Congress passed legislation in 1994 urging Americans to honor Dr. King by engaging in service on his holiday. Last year, Americans took part in 12,000 projects from coast to coast -- building homes, delivering meals, refurbishing schools, reading to children, signing up as mentors, and much more.

Six national organizations that were selected for King Day of Service grants are continuing their grant activities in FY 2011. For additional information on the grantees, see the Field Guidance Reference.

Representatives from each Cluster will work with these grantees to help facilitate input and support for grantee activities from states in each cluster and ensure these grantees are linked up with local partners, including Senior Corps grantees.

The Cluster representatives are:

- Atlantic Cluster – Mary Strasser, PA State Program Director
- North Central Cluster – John Hosteny, IL State Program Director
- Southern Cluster - Betty Platt, NC State Program Director
- Pacific Cluster – Amy Dailey, OR State Program Director
- Southwest Cluster – Terry Gunnell, AZ State Program Director

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New for 2011 – Senior Corps programs will be encouraged to participate in a letter writing campaign to Active duty military. Or collect items that will support military families or veterans. More specifics regarding the King Day of Service will be sent separately.

(C) September 11th National Day of Service and Remembrance

More information about the 9/11 National Day of Service will be provided as events are finalized.

SECTION VI. RESOURCE MATERIALS

(A) RSVP Re-Competition Online Resource Guide

The **RSVP Re-Competition Online Resource Guide** includes existing resources consolidated in a user-friendly way with materials in one location:

<http://www.nationalservicerresources.org/rsvp-online-resource-guide>

This is a living document and will expand as additional tools and training are available. It relies heavily on previously developed and high quality TTA materials related to RSVP projects and management

(B) Revised Senior Corps Compliance Monitoring Tool

A revised version of the **Senior Corps Compliance Monitoring Tool** will be available in by the end of calendar year 2010, and will contain the following revisions and additions:

- Restructured **Section C: Fiscal Requirements / Compliance** to better accommodate the flow of a site visit. The substance of Section C was not altered. The sequence of questions was rearranged to better reflect the steps State Program Staff take to assess fiscal compliance while conducting a monitoring visit. This section was updated by staff of the Field Financial Management Center (FFMC).
- Added new language in the **Overview** to better define why some protocol components of the Tool are *Mandatory* and others are *Recommended*.
 - *Mandatory* refers to those sections of the Tool that monitor programmatic, fiscal regulatory issues and legal issues.
 - *Recommended* refers to those sections of the Tool that assesses the qualitative aspects of the project's programming. It is an effective practice to conduct monitoring covered in these sections of the tool.
- Added a new *Not Applicable (N/A)* check box for protocol questions where the question does not apply to the grantee for a legitimate reason and to mark the "No" check box would be an inaccurate response.

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- Added clarifying language regarding the RSVP safety assessment. The new language states that, throughout the three year duration of the MOU:
 - The sponsor will conduct an annual assessment of safety at volunteer stations.
 - Each volunteer station will send an annual assurance of safety to the sponsor via email. The email from the volunteer station to the sponsor is an acceptable electronic signature.
- Clarified need for RSVP volunteer assignment descriptions and where they may be kept.
 - Projects may keep these in the volunteer station file, a notebook, a database, the volunteer file, or they may be located at the stations. Depending on the location of the document, answer this item by using the checklist for the random sampling of station files or the random sampling of volunteer files. If it appears that the descriptions are kept at the stations, the recommendation is to learn how the project verifies that the descriptions are thorough and that the volunteers are able to review a copy.
- Clarified an update to the Non-Discrimination Clause in the Sample MOU to include sexual orientation.

(C) [Review Progress Report Checklist](#) – This checklist, geared to the current OMB-approved Progress Report, is available for you to use in reviewing grantee reports and providing the feedback letters due within 45 calendar days of report submission. These letters include both areas for improvement as well as kudos for good reporting, achievement of planned outcomes, etc.

(D) Other Resources and Information

1) Train-the-Trainer Mentoring Curriculum –New & Coming Soon!

Senior Corps extended the contract with JBS International to develop a *Train-the-Trainer Mentoring Curriculum* focused on how significant assignments help to retain volunteers and can help to attract and recruit new volunteers. The easy-to-use curriculum can be used to enhance the services delivered by the volunteers.

The curriculum will:

- Help facilitate outreach and recruitment/retention of Foster Grandparent and RSVP volunteers with an emphasis on mentoring and tutoring services; and
- Help facilitate outreach and recruitment/retention of Foster Grandparent and RSVP volunteers interested in serving military families.

2) Train-the-Trainer Independent Living Training Curriculum

Providing Independent Living Support: Training for Senior Corps Volunteers was developed to provide a standardized and easy-to-use training curriculum for Senior

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Corps' Senior Companion and RSVP project directors who have volunteers delivering independent living services to seniors, to enhance the services delivered by the volunteers. The curriculum meets the need for creative and practical strategies and ideas that volunteers delivering independent living services can adapt when serving their own clients.

Providing Independent Living Support: Training for Senior Corps Volunteers consists of the curriculum (eight workshop modules) and accompanying Facilitator's Guide. The Facilitator's Guide is designed to support the facilitation of the workshop modules in the curriculum.

This curriculum is an excellent and readily available resource for SCP and RSVP projects engaged in independent living. The curriculum is organized as a 60-75 minute session. These workshops can be conducted individually or in combination of two or more.

The full curriculum and all materials are available here:

<http://www.nationalservicerresources.org/indep-living-training-curriculum>

3) Online Volunteer Management and Recruitment

Senior Corps continues to support Senior Corps grantees with an online volunteer management and recruitment system. VolunteerMatch will continue to:

- Maintain a branded presentation of Senior Corps data of 55+ volunteer opportunities in the network, maintain tracking and reporting formats;
- Provide individual accounts and account histories to grantees; and
- Provide trainings tailored to Senior Corps grantee needs and focusing on older adult volunteer recruitment strategies and best practices.

4) Peer Mentor Program

The Corporation continues to support new Senior Corps project directors with a Peer-to-Peer mentoring program for those employed 18 months or fewer.

The new contractor, Mary Louise Schweikert, will contact State Offices to continue the established peer mentor and mentee nomination process and will continue to work with State Offices to:

- Recruit experienced Senior Corps project directors as mentors;
- Train mentors using the Peer Mentoring Training Curriculum as the base content for each mentor training;
- Conduct outreach to identify new project directors in need of technical assistance; and
- Assure that the peer-mentoring program provides services proportionate across all three Senior Corps programs and is representative across all five clusters.

The contractor will send a separate email to State Offices with additional details and contact information.

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PART II

State Office Tasks in Implementing Senior Corps Goals and Strategies for FY 2011

Overview and Instructions: The goals, strategies, and tasks included below were developed in consultation with the Corporation Area Managers. They constitute the State Office plan for Senior Corps. In most cases, demonstrating progress towards achievement of the outputs/targets will be monitored through reports. If specific reports or plans are required, summary information and due dates are shown under the relevant goal. Tasks are numbered sequentially for easy reference.

(1) Service As A Solution

Objective	Task	Due Date
A. Support, track, and, as possible, increase the number of Senior Corps volunteers meeting high priority community needs defined by the Corporation	Task 1: Encourage the placement of RSVP volunteers in roles where they support the Corporation’s Strategic Initiatives, including increased emphasis on recruiting and coordinating community volunteers of any age.	Ongoing
B. Continue to focus on data accuracy and demonstrate continuous improvement in the quality of Senior Corps data in eGrants to ensure required data is submitted and reviewed for completeness and accuracy.	<p>Task 2: eGrants Data Integrity, Accuracy, and Timeliness</p> <p>Task 2.a: State Program Managers should review grantee submissions carefully for errors and/or missing data. Such errors should be corrected prior to grantee final submission.</p> <p>Task 2.b: Senior Corps, in conjunction with other Corporation departments, will generate “quality control” reports and provide oversight to State Offices. As needed, State Offices will be asked to correct data errors, or to work with grantees to do so.</p> <p>Task 2.c: Project Profile and Volunteer Activity (PPVA) – Data Supplemental Report Senior Corps grantees submit the PPVA annually. The PPVA is the sole source of data describing Senior Corps volunteer demographics and clients served.</p> <p>Ensure grantee participation in the PPVA data collection by checking in with grantees as PPVA opens in eGrants, assisting grantees as needed, reviewing grantee submissions using the PPVA checklist for accuracy and completeness, and helping grantees to fix data errors prior to final submission and certification.</p>	<p>Ongoing</p> <p>PPVA opens to grantees in eGrants– October 18, 2010</p> <p>Due date for grantees to complete PPVA in eGrants and submit to State Offices for review: November 30, 2010</p> <p>Due Date for Completion of Staff Review in eGrants with data ready for national aggregation for reporting to Congress: January 21, 2011</p>
C. Continue to identify non-Corporation investments in Senior Corps	Task 3: Complete the Fiscal Year 2010 State Funding Report.	March 18, 2011

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Objective	Task	Due Date
programs, with a focus on state appropriated funding and Medicaid Waiver funding.	Using the reporting template provided, please submit the following information based on Fiscal Year 2010: <ul style="list-style-type: none"> Section I – State Investments in Senior Corps Section II – Medicaid Waiver Funding 	
D. Collect Station Rosters from all projects	<p>Task 4: Volunteer Station Rosters</p> <p>Each Senior Corps grantee submits a current Volunteer Station Roster in a standard format as a required attachment to the annual grant application.</p> <p>State Offices should:</p> <ul style="list-style-type: none"> (a) Work as needed with Senior Corps grantees to ensure rosters are sent to the State Office; (b) Review grantee submission for completeness and help as needed; (c) Place the individual grantee station rosters into the designated shared folder. 	<p>Due date for State Offices to put final rosters into the shared drive folder: March 31, 2011</p> <p>S:\everyone\Senior Corps\2011 Station Rosters</p>

(2) Engaging Americans in a Lifetime of Volunteering and Service

Objective	Task	Due Date
A. Promote grantee participation in King Day of Service and 9/11 National Day of Service and Remembrance projects.	<p>Task 5: Encourage grantees to develop, lead, or participate in local King Day of Service and 9/11 projects, with an emphasis on projects that include community volunteers.</p> <p>Task 6: Work with grantees as needed to implement King Day of Service projects. Details will be provided separately from the MLK Day Team.</p>	More information will be forthcoming from the MLK Day Team

(3) Focus on Management: Sustaining Excellence

Objective	Task	Due Date
A. Provide grantees with the T/TA they need for successfully managing their programs and achieving high quality programming	Please refer to Section IV - Training Guidance. In 2011, grantees should be encouraged to attend the 2011 National Conference on Volunteering and Service (NCVS) in New Orleans, Louisiana if possible.	Ongoing

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Objective	Task	Due Date
<p>in key areas of interest to the Corporation, including Baby Boomer recruitment; volunteer mobilization; serving disadvantaged youth; independent living; performance measures; outreach to small community-based organizations both faith-based and secular; capacity building and sustainability; disaster preparedness and response; literacy and tutoring.</p>	<p>Task 7: Implement 2011 Training Guidance</p> <p>Task 7.a: Ensure that all Senior Corps grantees budget for training opportunities, including the NCVS in New Orleans or another training event related to project goals that are approved by the State Office.</p> <p>Task 7.b: Notify Senior Corps of any new project directors (on the job 12 months or fewer as of July 1, 2010 who do not plan to attend the New Project Director Training Pre-Con at the NCVS.</p> <p>Task 7.c: Assist grantees in assessing their T/TA needs and obtaining appropriate resources from The Resource Center and other sources.</p> <p>Task 7.d: Review and follow upon grantee T/TA requests cited in the PPR and note follow-up actions at the Review Progress Report screen.</p>	<p>As applications are received.</p> <p>Ongoing</p> <p>Ongoing</p> <p>Ongoing</p>
<p>B. Ensure grantees have access to management and programmatic tools to help them succeed.</p>	<p>Task 8: Assist grantees in adapting for local use:</p> <ul style="list-style-type: none"> ▪ SCP and FGP Optional Standard Work Plans posted at http://www.nationalserviceresources.org/star/sc-workplan, and ▪ FGP/SCP Age and Income Eligibility Forms and FGP Assignment Plan forms appended to the revised Operation Handbooks issued in June 2008. <p>Task 9: Ensure grantees are able to access and download any updates to the revised Senior Corps Operations Handbooks when they are posted online.</p> <p>Task 10: Ensure SCP grantees are able to access and download the Medicaid Waiver Guide and Independent Living Curriculum at http://www.nationalserviceresources.org/resources-specific-groups/senior-corps</p> <p>Task 11: Conduct RSVP Re-competition webinar with RSVP grantees.</p>	<p>Ongoing</p> <p>When Posted</p> <p>Ongoing</p> <p>TBD</p>
<p>C. Sharpen performance goals and measures for all existing and new grantees: Grantee</p>	<p>Responsibilities of Corporation State Offices are as follows:</p>	<p>Ongoing as grantee</p>

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	<p>projects with implementing Programming for Impact so that the following grant application requirements are achieved:</p> <ul style="list-style-type: none"> ▪ RSVP: 50 percent of RSVP volunteers serving in outcome/impact-based assignments that meet priority community needs ▪ FGP: 90 percent of Foster Grandparents serving in outcome/impact-based assignments. ▪ SCP: 90 percent of Senior Companions serving in outcome/impact-based assignments. ▪ Note: <u>All</u> Foster Grandparents and Senior Companions must have written volunteer assignment plans that identify the role and activities of the volunteer and expected outcomes. 	<p>submitted.</p>

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<p>D. Conduct more rigorous review of renewal applications and provide feedback to applicants.</p>	<p>Task 16.a: Participate in implementation of continuing RSVP renewal applications review process.</p> <p>Task 16.b. Participate in implementation of FGP and SCP renewal review process.</p> <p>For both above subtasks:</p> <ol style="list-style-type: none"> 1. Notify renewal applicants using standardized notification package. 2. Conduct reviews using standardized application review form (2 reviewers for RSVP; 1 reviewer for SCP/FGP). 3. Record results in eGrants. 4. Prepare feedback letters using standardized templates and obtain Area Manager concurrence. 	<p>Ongoing (see standard timetable below)</p> <p>Ongoing (see standard timetable below)</p> <ol style="list-style-type: none"> 1. NOFA opening minus approx. 30 days 2. App. due date + 1 work day 3. App. due date + 10 work days 4. App. due date + 10 work days

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	5. Paste feedback letters into eGrants. 6. Review grantee revisions, if any. 7. Approve and complete PO certification. 8. Develop T/TA plan and discuss with applicant.	5. App. due date + 15 work days 6. App. due date + 20 work days 7. App. due date + 24 work days 8. 30 days after completing review
E. Conduct review of grantee Progress Reports (PPR) and provide feedback	Task 17: Within 45 calendar days of grantee submission, review each Progress Report and fill out the Corporation staff review screen (Review Progress Reports) in eGrants, following the Review Progress Report Checklist . <ul style="list-style-type: none"> ▪ Review the entire Progress Report for content, completeness, and accuracy and give feedback as needed. ▪ Review the 1 to 2 work plans containing the Performance Measures selected by the grantee. ▪ Provide feedback letter to grantee. ▪ Copy and paste feedback letter into the “Other Comments” field at the Review Progress Reports screen. 	Within 45 calendar days of grantee Progress Report submission dates.
F. Follow the Corporation’s Oversight and Monitoring Policies (AOM-2006-001, AOM-2006-002 and AOM-2007-001) and the guidance for FY 2011 posted at the Office of Award Oversight and Monitoring Intranet site that describe protocols and procedures for assessment, setting priorities, scheduling and conducting monitoring site visits, and documenting monitoring activities and	Task 19: Conduct site visits or other monitoring activities, as required. Task 20: Complete all required eGrants documentation per Corporation Policy. Task 21: State Offices complete assessment process for FY 2012 monitoring plans. Task 22: State Offices complete FY 2012 Monitoring Plans, including use of “Overall Programmatic Comments” field to address any concerns about the grantee’s ability to meet its established performance measures and/or provide examples of	Ongoing, in accordance with monitoring plans. Ongoing, as monitoring activities are planned and completed. July-August 2011 In accordance with monitoring planning guidance.

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<p>findings in eGrants.</p>	<p>programmatic issues of any kind.</p> <p>State Offices are expected to use the template letters developed for compliance monitoring feedback to ensure consistency in official correspondence to grantees. Template Letters are located on the Intranet at the Office of Field Liaison (OFL) and Award Oversight and Monitoring (AOM) sites.</p>	
<p>G. Establish an improved, equitable, and sound framework for management of unused volunteer slots (VSYS) for FGP and SCP Volunteer Service Years.</p>	<p>Task 23: Rebudgeting Approvals. Obtain approval following procedures outlined below for grantee requests to rebudget funds from the stipend line item to other line items. Note: Such requests will only be considered for approval when the rebudgeting is for expenses that can reasonably be expected to reduce or eliminate a shortfall in VSYS performance. Otherwise, grantees anticipating surplus stipend funding should be encouraged to temporarily relinquish funds, as discussed in the reference document "Q&A on Temporary Relinquishment and Reallocation of FGP and SCP VSYSs" so these funds can be temporarily reallocated to another grantee.</p> <p>Senior Corps understands that State Office re-budgeting approvals are rare. However, in the event that re-budgeting requests affecting the stipend line item are received for FGP and SCP and approved by the State Offices, the State Program Director must submit the following data to the Area Manager and FFMC:</p> <ul style="list-style-type: none"> ○ Grantee name, project name, grant number, city and state. ○ Amount of funding re-budgeted from the stipend line item. ○ Number of VSYS slots unfilled that prompted the grantee request to expend stipend funds for other purposes. ○ Description of how the rebudgeted funds would be used. <p>Upon concurrence of the FFMC, the Area Manager's approval will be forwarded to the Senior Corps Executive Officer for final approval.</p> <p>Requests that receive final approval will be communicated back to the Area Manager, FFMC Grants Officer, and State Program Director. The program manager in the State Office then works with grantee to enter a rebudget amendment in eGrants for the official record.</p> <p>Task 24: Continue applying policy on temporary relinquishment of VSYSs. [See "Q&A on Temporary Relinquishment and Reallocation of FGP and SCP VSYSs"]</p> <p>Task 25: Work with Area Managers to develop prioritized lists of SCP and FGP grantees</p>	<p>Forward rebudgeting requests to the Area Manager and the FFMC within 30 calendar days of their receipt.</p> <p>Ongoing</p>

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	<p>that can effectively use additional temporary Volunteer Service Years (VSYs) that will be submitted by the Area Managers to Senior Corps.</p> <p>Task 26: Develop and take action on approved items on prioritized lists of FGP and SCP grantees that can effectively utilize additional temporary VSY funding, should end of fiscal year funding become available.</p>	<p>June 24, 2011</p> <p>July 11, 2011</p>
<p>H. Customer Service Delivered by the Corporation to Grantees</p>	<p>Task 27: Customer Satisfaction Survey. In 2010, as in previous years, the Corporation administered a <i>Customer Satisfaction Survey</i> to all of its grantees, including Senior Corps. Through this survey, grantees may provide feedback on the quality of customer service they receive from the Corporation. The results are a source of data for national reporting and provide vital feedback to the Corporation about successes and areas for improvement.</p> <p>State Offices have a primary role in helping their Senior Corps grantees understand the importance of the survey and encouraging them to complete and submit the survey by the deadline. The Office of Field Liaison sent an initial announcement 2 weeks before the survey opens.</p>	<p>September 2010</p>
<p>I. Non-Corporation Funding Sources</p>	<p>Task 28: Encourage grantees to contact colleagues in other states who have been successful in generating state funds.</p> <p>Task 29: Reporting on sponsor fundraising successes. Continue to use the monthly report as a vehicle to report other non-Corporation funding for Senior Corps projects receive from foundations, corporations, businesses, major bequests, etc.</p>	<p>Ongoing</p> <p>Monthly per Field Liaison schedule</p>