

**AMERICORPS LEGAL
FELLOWSHIPS 2011-2012**
Host Site Program Manual

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Table of Contents

Introduction	5
<i>Equal Justice Works AmeriCorps Legal Fellowship Program.....</i>	<i>5</i>
<i>Equal Justice Works Summer Corps Program.....</i>	<i>5</i>
Summer Corps and AmeriCorps Legal Fellowship Host Sites and Fellows.....	5
<i>The Corporation for National and Community Service and AmeriCorps</i>	<i>5</i>
<i>AmeriCorps National Directs and State Service Commissions.....</i>	<i>6</i>
<i>Equal Justice Works Responsibilities.....</i>	<i>6</i>
<i>Host Site Responsibilities</i>	<i>7</i>
<i>Contact list of Equal Justice Works Staff.....</i>	<i>7</i>
Fellow Management.....	8
<i>Recruitment and Selection</i>	<i>8</i>
New Hire Procedure	8
<i>Service Terms</i>	<i>8</i>
<i>Term Restrictions.....</i>	<i>8</i>
<i>AmeriCorps Legal Fellow Files</i>	<i>9</i>
Enrollment Documents	9
Fellow Contracts	9
AmeriCorps Fellowship Workplan	10
Time logs and Timekeeping.....	10
Mid- and End-of-Term Performance Evaluations.....	11
Loan Forbearance Request and Interest Accrual Request	12
Exit Documents.....	12
<i>Criminal History Checks.....</i>	<i>13</i>
Required Procedures for Conducting Criminal History Checks	13
<i>Compensation and Benefits</i>	<i>14</i>
Living Allowance	14
Supplemental Benefits.....	14
Other Benefits	15
AmeriCorps Education Award	15
Insurance.....	15

<i>Supervision</i>	16
AmeriCorps Prohibited Activities	17
Program Management	18
<i>Serving as a Fiscal Agent for other Organizations</i>	18
<i>Performance Measures</i>	18
<i>Reporting</i>	18
<i>Monitoring</i>	19
Site Visits.....	19
Desk Audits.....	20
Technical Review	21
Financial Management	22
<i>AmeriCorps Financial System Requirements</i>	22
Key Aspects of Successful Financial Management	22
<i>Reporting</i>	23
Periodic Expense Reports (PERs)	23
Common PER Mistakes	23
Systems Corner	23
<i>AmeriCorps Reporting and Enrollment System (ARES)</i>	23
Fellow Enrollment Instructions	23
Fellow Exit Instructions.....	26
<i>Grants Management System (GMS)</i>	26
Appendix 1: 2011-2012 Performance Measure Categories	27
Appendix 2: Sample Monthly Time Log	28
Appendix 3: Creating a Budget	29

Congratulations on your participation in the Equal Justice Works AmeriCorps Legal Fellowship Program! The mission of Equal Justice Works is to create a just society by mobilizing the next generation of public interest lawyers committed to equal justice. For over 15 years, Equal Justice Works has partnered with the Corporation for National and Community Service to manage AmeriCorps programs for lawyers and law students. In that time, 475 AmeriCorps Legal Fellows and 2,972 Summer Corps Members have served communities across the country. Equal Justice Works has risen to be the 13th largest AmeriCorps Program in the country. This is a testament to your program management and support of the AmeriCorps Fellows.

Your continued success drives our expansion. The impact AmeriCorps Legal Fellows has leveraged major increases in program funding; Equal Justice Works has nearly tripled the funding we received in 2007-2008. Due to the success of the AmeriCorps Recovery Fellowships funded through the American Recovery and Reinvestment Act, Equal Justice Works now operates two grants, each with 40 Fellows.

This manual describes the policies and procedures of the Program. Equal Justice Works has strong values that guide the program:

- Fellows represent three powerful entities: your organization, Equal Justice Works, and AmeriCorps. We ask that you educate the Fellows on all three aspects of their Fellowship.
- Equal Justice Works depends on host sites to provide effective and rewarding service experiences for Fellows. We understand that a supportive site is the most important indicator of success for an effective Fellowship.
- We train the Fellows to be leaders in their communities and organizations, and to advocate for their clients with all of their skills and passion.
- Fellows, site staff and Equal Justice Works are all part of the national service movement. We pride ourselves on the affiliation with other programs, state commissions and the 100,000 AmeriCorps Members across the country who share the values of getting things done.
- Equal Justice Works insists on excellence in program management and compliance. We consider management of taxpayer dollars to be a sacred trust, and we strive to manage the most effective and efficient program in the country.

Thank you for your commitment to filling the justice gap and engaging the next generation of public interest lawyers. We are delighted to partner with you to manage the program. We want to hear from you—please contact one of us each month to let us know how things are going.

Sincerely,

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Senior Program Manager, AmeriCorps

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Introduction

Equal Justice Works AmeriCorps Legal Fellowship Program

The Equal Justice Works AmeriCorps Legal Fellowship Program (Program) is one of the most productive and highly regarded national service programs in the nation, making a lasting impact on the communities it serves by facilitating pro bono opportunities and expanding the legal resources in low-income and underserved communities.

Equal Justice Works AmeriCorps Legal Fellows (Fellows) work to improve access to justice for low-income clients nationwide. Supported by two AmeriCorps grants from the Corporation for National and Community Service (CNCS), the Program is a postgraduate opportunity to address gaps in legal services through pro bono management and direct legal services. By bringing together volunteer law students and lawyers with community legal aid providers, Fellows are able to expand their services and serve more clients while gaining hands-on experience and providing direct legal services and developing substantive legal resources. Fellows work to narrow the justice gap in many areas, including health care, public benefits, veterans' issues, foreclosure defense, affordable housing, lost wages, immigration rights and education.

Fellows earn a \$5,550 AmeriCorps Education Award voucher upon completion of at least 1,700 hours of service that can be used to pay current educational expenses or qualified student loans. The amount of the Education Award could vary based on the number of AmeriCorps terms that a Fellow has served.

Equal Justice Works Summer Corps Program

The Equal Justice Works Summer Corps Program (Summer Corps) engages law students around the country who are working to expand the delivery of legal services to those who need it most. Summer Corps is an AmeriCorps-funded program that in 2012 will provide 700 law students with the opportunity to dedicate their summer to public service at qualifying nonprofit and public interest legal projects.

Summer Corps members earn a \$1,175 AmeriCorps Education Award voucher upon completion of 300 hours of service that can be used to pay current educational expenses or qualified student loans. The Summer Corps education award is the same type of award an AmeriCorps Legal Fellow receives at the end of his/her term of service, but at a reduced amount.

Summer Corps and AmeriCorps Legal Fellowship Host Sites and Fellows

Many current Equal Justice Works AmeriCorps host sites are hosting Summer Corps members in 2011. Based on availability of funding, Equal Justice Works holds Summer Corps slots for current AmeriCorps host sites. Although Fellows are encouraged to act as mentors to Summer Corps members, Fellows should not be named as supervisors in the Summer Corps applications. Fellows should not sign contracts or certify time logs on behalf of Summer Corps members. Because Summer Corps is an AmeriCorps program, service in the program counts as a term of service. Please see the **term restriction section** for more information about restrictions on terms of service.

The Corporation for National and Community Service and AmeriCorps

The Corporation for National and Community Service (CNCS or the Corporation) is the agency that oversees AmeriCorps and grants funds to Equal Justice Works and hundreds of other organizations.

In 1993, President Bill Clinton signed the National and Community Service Trust Act, which established the Corporation for National and Community Service and brought the full range of domestic community service programs under the umbrella of one central organization. This Act incorporated two existing national service programs: the longstanding VISTA (Volunteers in Service to America) program, created by President Lyndon Johnson in 1964 and the National Civilian Community Corps (NCCC), and created the umbrella for state and national programs across the country, such as Equal Justice Works AmeriCorps. In 2009, President Obama signed the Edward M. Kennedy Serve America Act, which will expand AmeriCorps to 250,000 members by 2017. [Contact us](#) if you are interested in hosting year-round AmeriCorps*VISTA members or requesting a team of AmeriCorps NCCC members to help with a time-limited service project.

AmeriCorps National Directs and State Service Commissions

Through a competitive process, CNCS grants funds to State Service Commissions (Commissions) and nonprofits that operate in more than one state, called National Directs. Equal Justice Works AmeriCorps is a National Direct and is currently the 13th largest AmeriCorps program in the country. National Directs also subgrant AmeriCorps funds to state and local programs, and serve as the compliance agent as well as the manager of the program.

Commissions are governor-appointed public agencies or private nonprofit organizations, made up of more than 1,200 private citizens, leading the nation's philanthropic movement. Commissions serve at the state level in re-granting more than a quarter of a billion dollars from federal national service funds. Commissions also play a major role in convening state partners around volunteerism, setting the state agenda for civic engagement and supporting volunteerism across their states. Commissions often host trainings, InterCorps Councils and AmeriCorps Alumni chapters, opportunities which host sites and Fellows may participate in (often free of charge).

As a national program, Equal Justice Works seeks to collaborate with all Commissions, particularly in states where Fellows serve. Equal Justice Works reports site locations and results to Commissions, and asks sites to maintain a collaborative relationship with Commissions as well.

Equal Justice Works Responsibilities

Equal Justice Works is committed to serve as an effective partner in the management of all AmeriCorps Fellowships. The roles of Equal Justice Works include training and technical assistance, support of program staff and AmeriCorps Fellows, and compliance monitoring. Specific Equal Justice Works responsibilities include:

- Financial reporting
 - Host site budget review and approval
 - Overall program budget responsibilities
 - Timely disbursement of CNCS grant dollars to host sites
 - Timely review and approval of host site's monthly Periodic Expense Reports (PERs)
- Program reporting
 - Overall grant management and accountability to CNCS
 - Financial and program results reporting and evaluation functions with CNCS
- Host Site support
 - Orientation and training for host sites on AmeriCorps management, regulations, and effective practices
 - Support to host sites regarding member monitoring and supervision

- Fellow support
 - Leadership development training and career support for Fellows, including orientation regarding public interest law, national service and Equal Justice Works
 - Support to both host sites and AmeriCorps Fellows on planning and implementing service activities

Equal Justice Works also strives for the creation of a national community of public interest lawyers and peer networks to ensure quality Fellowship experiences. Equal Justice Works aspires to advance the Fellows' career and the host organization's capacity.

Host Site Responsibilities

Host sites must demonstrate capacity to administer federal funds, implement a detailed plan of action to address a local unmet need, present strong connections to the community and have the ability to raise the required matching funds. The responsibilities for operating an AmeriCorps program include:

- Recruiting, selecting, placing, training and supervising the AmeriCorps Legal Fellows;
- Designating staff (Project Director, Fiscal Manager and Fellow Supervisor) responsible for fiscal compliance and program compliance and sending staff to the Site Staff Training and Strategy Meeting each July;
- Providing bi-weekly living allowance payments and basic health care coverage for the AmeriCorps Fellows;
- Maintaining a separate accounting system for all funding related to the AmeriCorps grant and providing a dollar-for-dollar match for all Corporation grant funds;
- Submitting bi-annual progress reports, and monthly expense reports (PERs);
- Participating in *ad hoc* technical assistance calls and AmeriCorps evaluation efforts;
- Providing clear direction, supervision and support to AmeriCorps Fellows; and
- Defining, explaining and recognizing the service provided by AmeriCorps Fellows to stakeholders in your community.

Contact list of Equal Justice Works Staff

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Fellow Management

Recruitment and Selection

Equal Justice Works assists host sites with promoting the AmeriCorps Fellowship positions to law schools, firms and stakeholders. Host sites are responsible for interviewing and selecting Fellows and Summer Corps Members.

- Please note: Although Equal Justice Works does not participate in the hiring of Fellows, all position descriptions must be approved by Equal Justice Works before being distributed or advertised to potential applicants.

Host sites will report on the number of applicants for each open position and this data will factor into subsequent monitoring activities.

New Hire Procedure

As part of the host site application process, host sites submit potential Fellow position descriptions to Equal Justice Works. Equal Justice Works reviews the descriptions, approves them, and returns them to each host site upon approval of funding. Each host site is responsible for advertising their open positions and recruiting their own Fellows. Host sites may not distribute the position descriptions until they are approved by Equal Justice Works.

Once host sites have selected new Fellow(s), please send the [AmeriCorps Inbox](#) the following:

1. Resume of new Fellow(s).
2. Exact start date(s).

In 2010, Equal Justice Works launched the [AmeriCorps Reporting and Enrollment System \(ARES\)](#). The new system manages all Fellow enrollment and exit paperwork and serves as the reporting portal for the mid-year and end-of-year progress reports. The system is secure, efficient, and almost completely paperless. ARES allows host sites to manage all of the grant requirements in one place for all of their Fellows.

For more information on ARES and the Fellow Enrollment process, please see the Systems Corner located at the end of this Manual.

Service Terms

The Equal Justice Works AmeriCorps Program will engage Fellows in full-time terms of service, which are at least 1,700 hours in 11 or 12 months (at the discretion of the host site, and as delineated in the AmeriCorps Fellows' contract). Upon successful completion of their term of service, Fellows will receive an education award from the National Service Trust in the amount of \$5,550. Please note that Fellows who have served in previous AmeriCorps terms may not be eligible for all or part of the education award.

Term Restrictions

Under a new AmeriCorps rule (effective September 20, 2010), individuals are able to serve up to the equivalent value of two full-time service terms. This rule allows for individuals who have served previously (but no more than two times) in the Equal Justice Works' Summer Corps Program, to serve two full AmeriCorps Legal Fellow terms. This rule also allows for individuals who have served in other AmeriCorps programs (VISTA, NCCC, or another State or National program) to serve in the Equal Justice Works AmeriCorps Legal Fellowship Program. The amount of the AmeriCorps education award might be

less than \$5,550 if an individual has served in other AmeriCorps programs. For specific questions on eligibility, please contact [Natalie](#).

AmeriCorps Legal Fellow Files

As of August 2010, Equal Justice Works has transitioned into a completely electronic member file system. All of the documents listed in the following sections are part of the AmeriCorps Reporting and Enrollment System (ARES). Unless specifically requested by staff, there is no reason to send or email Equal Justice Works any of the below documents; everything can be uploaded into ARES. A more detailed, in depth description of each item and how to complete it in ARES is located in the Systems Corner at the end of this manual.

Enrollment Documents

- Fellow Resume and/or Application
- I-9 Employment Form
- Documentation of AmeriCorps Eligibility
- W-4 Tax Form (maintain at host site – does not need to be uploaded in ARES)

Fellow Contracts

All AmeriCorps members must sign a service contract. By no later than the first day of the term of service, sites must fully execute a contract with each Fellow. Only contracts with both a Fellow and host signature are considered fully executed. **The Fellow cannot receive service hours toward the AmeriCorps education award until the contract is signed by both parties.** The contract will be automatically populated in ARES, there is no need for each host site to create their own contract.

Important components of the service contract (required by CNCS):

- **Term of service:** A term of service is the time the Fellow is serving at the host site. Fellows serve an 11 or 12 month term of service at the host site; the service term must be less than 365 calendar days. For example, a term of service can be from 8/1/11-7/31/12 or 8/1/11-6/30/12. The host site is responsible for setting a service term that allows for the Fellow to complete at least 1,700 hours of service to be eligible for the Education Award.
- **Position Description:** This section includes the activities and responsibilities of the individual Fellow. This description should be the same position description approved by Equal Justice Works and it will guide the Fellow's workplan.
- **AmeriCorps Prohibited Activities and Host Site Standards of Conduct:** Fellows and sites must agree not to participate in the AmeriCorps prohibited activities. The host site also agrees to a standard of conduct during the Fellow's term of service.
- **Publicity Release:** According to the AmeriCorps provisions, host sites must obtain the prior written consent of all Fellows before using their names, photographs or other identifying information for publicity, promotional or other purposes.
- **Other Benefits:** Benefits the AmeriCorps Fellow will receive from the site -- local travel expenses, professional development, etc.
- **Suspension and Termination Rules:** The Equal Justice Works Fellow Contract has very specific Suspension and Termination Rules that apply to all Fellows currently in service. Please refer to the Contract for the specific Rules.
- **Grievance Procedures:** AmeriCorps Fellows agree to host site's grievance procedure to resolve disputes concerning the AmeriCorps Fellow's suspension, dismissal, service evaluation or

proposed service assignment. When appropriate, AmeriCorps Fellow may file a grievance in accordance with the host site's grievance procedure.

Additional Contract:

- **Supplemental Benefits:** AmeriCorps Fellows are reimbursed for certain living expenses with supplemental benefits. Host sites agree to provide a certain amount of supplemental benefits during the term of service for each Fellow. During enrollment, the host site will obtain the actual expenses from each Fellow and list these costs in the supplemental benefits section in ARES. Fellows are only reimbursed for the actual expenses incurred. The actual amounts of living expenses may be modified during the course of the term of service and can be amended in ARES to reflect any changes.
 - *Equal Justice Works recommends using Supplemental Benefits for larger, easily provable expense such as rent, car payments, student loan payments, or mortgage payments. If the amounts of the expenses change during the term of service, sites may modify the Supplemental Benefits form to show the new amounts.*
 - *Equal Justice Works does not recommend using Supplemental Benefits for smaller and difficult to track expenses such as food and gas.*
 - *Host sites may not list unspecified bills and/or 'miscellaneous' for expenses.*
- During a Desk Audit or site visit, Equal Justice Works will ask for documentation supporting the Fellows' Supplemental Benefits expenses. Appropriate documentation could be a rental lease outlining the amount due per month, receipt for rent payment or mortgage payment, documentation of car payment or loan payment, documentation of utility bill payments, receipts for gas or food. Please ensure all Fellows maintain all supporting documentation for purchases, payments, or bills throughout the year.

AmeriCorps Fellowship Workplan

All host sites must submit workplans for each Fellow to Equal Justice Works. Fellows will develop a work plan with the supervisor to establish project goals and to guide weekly supervisory meetings. Fellows typically balance time on volunteer management and on providing direct legal representation. The workplan does not constitute an obligation on the part of the organization to complete all tasks, but it does serve to prioritize activities, increase productivity and minimize confusion of the different roles a Fellow plays in the organization and community. Please complete the workplan within the first month of the term, keep and update the original as needed, and submit a copy to Equal Justice Works via ARES.

Time logs and Timekeeping

Accurate time logs are extremely important. Fellows should follow the timekeeping procedures of the host site. To ensure AmeriCorps compliance, all Fellow time logs **must** include the following:

- **Service vs. Training Hours:** Host sites must keep a record of the hours each Fellow spends in service and in training (*of the Fellow, not trainings performed by the Fellow*) on a weekly basis. No more than 20% of the aggregate of all Fellow service hours may be spent in education and training activities. *Be sure to track on-site orientation activities, Equal Justice Works Leadership Development Training, the Equal Justice Conference, and other Equal Justice Works-sponsored trainings as training hours.*
- **Signatures:** Each time log must be signed by both the Fellow and their supervisor, e.g., an individual in the AmeriCorps Fellow's office rather than someone with no personal knowledge of the Fellow's service. In addition, the signing supervisor should remain consistent and not

change week after week - of course, another staff member should step in when the regular supervisor is out of the office. Fellows and supervisors should be signing the time logs on or after the last day of the time log and within the payroll period.

- **What Hours Count:** Service hours are those hours actually worked. AmeriCorps Fellows do not receive extra hours over and above those worked under any circumstances, such as “comp time” or “time-and-a-half.” Holidays, leave time and other absences may not be counted toward hours served but should be included in the programmatic year. Fellows and host sites should maintain on-going tallies of the number of hours served to date, hours remaining to earn the education award, and average weekly hours needed to receive the award. Equal Justice Works will request periodic updates on Fellow hours.
 - **Leave Time:** It is the responsibility of the host site to allow Fellows to serve at least 1,700 hours. Equal Justice Works recommends that Fellows are allowed to accrue the equivalent amount of leave time that first or second year attorneys receive at the host site. If a Fellow is taking leave time, s/he still needs to complete time sheets even though the time served would be zero. This is important because the Fellow should still be receiving their set amount of living allowance during leave time (since their living allowance is not based on the number of hours they are serving). ***Fellows cannot be financially compensated for any unused leave time at the end of the Fellow’s term of service.***

Note on Fundraising Hours: Fellow fundraising hours should be limited to fundraising that contributes directly to the AmeriCorps program. Fellows cannot spend any time supporting fundraising efforts for their own compensation. You must ensure that any fundraising hours are tracked separately from Service and Training hours.

Equal Justice Works understands that host sites often have very complicated time and case management systems (KEMPS, PIKA, etc.) and the AmeriCorps regulations do not fit well into these systems. Please ensure that if you plan to use an already existing case management system to track time, you develop an AmeriCorps-specific time log based on the requirements above. Equal Justice Works has provided a sample AmeriCorps-specific time log in the Appendix of this manual.

Mid- and End-of-Term Performance Evaluations

AmeriCorps provisions require that sites conduct at least a mid-term and end-of-term written evaluation of each Fellow’s performance, focusing on such factors as completion of service hours and assignments. It is allowable to use forms already being used for other employees, but the end-of-term evaluation must assess whether the Fellow has:

- Completed the required number of hours;
- Satisfactorily completed assignments, tasks, and projects; and
- Met any other performance criteria which were communicated at the start of service.

These aspects of the end-of-term evaluation are important because they dictate whether or not an individual is eligible for future AmeriCorps terms of service.

Note that evaluations should be conducted according to each Fellow’s term, not the overall grant term.

- Example: A site’s grant term begins on August 1, but the Fellow does not begin serving until September 1 and her expected completion date is August 31. Fellow’s midterm evaluation

should be conducted at some point in March (6 months after September 1st) and not in February (6 months from start of site's grant term).

For a Fellow exiting the program before the mid-point of their term of service, host sites do not need to complete a mid-term performance evaluation but must complete an end-of-term performance evaluation. If a Fellow exits the program after the mid-point of the term of service, but before successfully completing the Fellowship, host sites must complete both evaluations for the Fellow (mid-term and end-of-term).

Loan Forbearance Request and Interest Accrual Request

All participants in AmeriCorps programs are eligible to place qualified federal student loans in forbearance during their term of their service. The government will also pay the interest that accrues on these loans as a benefit of AmeriCorps service. The national service legislation defines a *qualified student loan* as a loan backed by the federal government under Title IV of the Higher Education Act. Unfortunately, private loans do not fall within that definition. Fellows should be informed that privately funded loans are not eligible for loan forbearance during AmeriCorps service. If a Fellow is uncertain about whether a particular loan will qualify, s/he should contact the lender or call the National Service Trust Help Line at (888) 507-5962.

The Fellow will need to log into the [My AmeriCorps Portal](#) to place qualified student loans into forbearance. Equal Justice Works will provide an introduction to the My AmeriCorps portal at the beginning of the Fellow's term of service. Once the Fellow has requested forbearance through the Portal, the Fellow should confirm with the lender that the loans are actually in forbearance.

Fellows should print out any loan forbearance requests from the My AmeriCorps Portal and the host site should place the requests in the member file.

After a Fellow successfully completes a term of service, s/he may log into the My AmeriCorps Portal and request that the National Service Trust pay the interest that has accrued on the qualified student loans placed into forbearance during their term of service.

- Please note: the interest accrual payment is considered taxable income in the year it was paid by the IRS and Fellows must claim the payment as income on their tax returns.

It is important to note that if a Fellow places eligible loans in forbearance during their term of service, the Fellow will lose the opportunity to make payments towards Public Service Loan Forgiveness (PSLF). All AmeriCorps positions are eligible positions for PSLF but Fellows must be making payments on qualifying loans while serving to be eligible for PSLF. A Fellow should determine whether the income-based repayment (IBR) option and PSLF is an option for his/her financial situation by researching the information found on the [Equal Justice Works Resources](#) webpage.

*Whether or not eligible loans are placed in forbearance may affect your IBR and PSLF options. Please contact a tax professional to review your options.

Exit Documents

All exit documents must be completed for all Fellows, even for those Fellows who do not successfully complete terms of service. These forms are all completed electronically in ARES.

- Exit Form

- Certification of Non-Participation in AmeriCorps Prohibited Activities
- Final Time Log
- Final Fellow Results

Exit Form Tips:

- Both the Fellow and their Supervisor must sign the form.
- Ensure the total number of hours spent participating in training are placed in the Training Column and service hours are placed in the Service Column.
- Start Date of Term of Service and Date of Completion of Term of Service should mirror the Fellow's Contract Start and End Dates.
- Fellow and Supervisor should sign the Exit Form on or after the last day (end date of contract, NOT last day recording hours) of the Fellow's term of service.

Criminal History Checks

Criminal History Checks are required for all Fellows. *A background check for bar admission is not sufficient to meet this standard.* To be compliant with the AmeriCorps regulations, host sites must perform these checks on all Fellows:

1. National Sex Offender Public Registry (www.nsopr.gov) – Must be conducted prior to the start of the Fellow's service.
2. State criminal history check for state of service.
3. State criminal history check for state of Fellow's residence at time of application (address on Fellow's resume).
4. FBI Fingerprint Criminal Background Check
 - a. [More information](#) on how a Fellow can request their own Check.
 - b. [More information](#) from CNCS on how to request FBI Checks.

The State Criminal History Checks and FBI Fingerprint Check can be in process at the start of the Fellow's service, but checks must be cleared before interacting with vulnerable populations (children, persons age 60 and older, or individuals with disabilities). If a Fellow has not been cleared, s/he must be supervised by someone who has been cleared when interacting with vulnerable populations.

If a Fellow is continuing on with a second term with the same host site, you do not need to conduct the criminal history checks again. The only time you would need to do so is if there is a break longer than 30 days between their terms of service. If a Fellow is transferring from one host site to the other, the receiving host site will need to conduct the checks again regardless of if there is a break in service.

Host sites must conduct all of the above criminal history checks on **any staff** that directly charge their time to the AmeriCorps grant. Equal Justice Works encourages all host sites to exclude direct personnel expenses from their AmeriCorps budgets, but in the event that that is impossible, the host site must complete the checks on those individuals as well.

Required Procedures for Conducting Criminal History Checks:

1. Verify the applicant's identity by examining the individual's government-issued photo identification card, such as a driver's license or passport.
2. Using the release available in ARES, obtain the applicant's written authorization prior to conducting state criminal history checks, FBI fingerprint check and the NSOPR check and to share the results (but not for NSOPR check) within the program.

3. Document the applicant's certification that selection into the program is contingent upon the organization's review of the individual's criminal history, if any.
4. Provide a reasonable opportunity for applicants to review and challenge results.
5. Provide safeguards to ensure confidentiality of any information relating to the criminal history check, consistent with authorization provided by the applicant.

Required Documentation:

1. Written verification of applicant's identity.
2. Results of the criminal history checks must be maintained, unless prohibited by State law.
3. Written documentation that the host site conducted the required checks and considered the results in selecting or retaining the individual.
4. Completed the background check verification in ARES.

An individual is **ineligible** to serve in AmeriCorps if they:

- (1) Are listed or required to be listed on a sex offender registry;
- (2) Have been convicted of murder as defined and described in Section 1111 of Title 18, United States Code;
- (3) Refuse to undergo any of the criminal history checks outlined above.

Host sites should maintain all documentation pertaining to the criminal history check in a separate, secure file. Host sites have the discretion to reject applicants based on other offenses.

Compensation and Benefits

Fellow compensation and benefits include many different pieces:

1. Living allowance;
2. Supplemental Benefits;
3. Other benefits;
4. AmeriCorps Education Award; and
5. Insurance (Malpractice and Health).

Living Allowance

The AmeriCorps living allowance is the portion of a Fellow's compensation that is subgranted from CNCS through Equal Justice Works. The living allowance must be closely monitored so to ensure compliance with AmeriCorps regulations.

The living allowance is not a wage and programs may not pay living allowances on an hourly basis. Programs must distribute the living allowance at regular intervals and in regular increments throughout the Fellow's entire term. Living allowance payments may only be made to a Fellow during his/her term of service and must cease when the Fellow concludes the term of service. Programs may not provide a lump sum payment to a Fellow who completes the originally agreed-upon term of service in a shorter period of time. For the 2011-2012 program year, the living allowance is \$24,200.

Supplemental Benefits

Fellows are reimbursed for certain living expenses with supplemental benefits. Host sites agree to provide a certain amount of supplemental benefits during the term of service for each Fellow. For the 2011-2012 program year, Equal Justice Works requires that host sites provide \$12,000-\$22,000 in supplemental benefits per Fellow per term of service. During enrollment, the host site will obtain the

actual expenses from each Fellow and list these costs in the supplemental benefits contract in ARES. Fellows are only reimbursed for the actual expenses they incur. A more detailed list of allowable expenses is listed on page 10. The actual amounts of living expenses may be modified during the course of the term of service and can be amended in ARES to reflect any changes.

Other Benefits

Benefits the AmeriCorps Fellow will receive from the site throughout their term of service -- local travel expenses, professional development, life insurance, disability insurance, bar dues, etc.

AmeriCorps Education Award

Fellows who successfully complete a term of service are eligible for the Segal AmeriCorps Education Award. The education award is not a check and does not come to the Fellow as money, but is a \$5,550 voucher to be put towards qualifying educational expenses. Fellows who do not successfully complete the term of service are not eligible for the education award.

- The Education Award value does not affect host site budgeting and is not accounted for in the budget.
- As previously noted, the amount of the Education Award may vary depending on whether or not a Fellow has served previous AmeriCorps terms.

Insurance

Fellows are required to have at least the following insurance:

- Healthcare: Host sites must provide healthcare insurance to those Fellows serving a 1,700-hour full-time term who are not otherwise covered by a healthcare policy at the time each begins his/her term of service. Host sites must provide healthcare coverage that meets the following minimum benefits:
 - A. Physician services for illness or injury
 - B. Hospital room and board
 - C. Emergency room
 - D. X-ray and laboratory
 - E. Prescription drugs
 - F. Limited mental/nervous disorders
 - G. Limited substance abuse coverage
 - H. An annual deductible of no more than \$250 charges per member
 - I. No more than \$1,000 total annual out-of-pocket per member
 - J. A 20% co-pay or a comparable fixed fee with the exception of a 50% co-pay for mental and substance abuse care
 - K. A maximum benefit of at least \$50,000 per occurrence or cause

*The host site is not required to provide health insurance if the Fellow is covered otherwise. The host site is required to provide health insurance if the Fellow loses other coverage. The Program should maintain documentation of the Fellow's other health insurance. Whether or not the host site is required to provide health insurance does not change the match requirement.

*Host sites are allowed to continue to pay for a Fellow's health insurance (for up to 12 weeks) while the Fellow is suspended for maternity leave regardless of whether or not the organization qualifies under the Family and Medical Leave Act (FMLA). Please contact [Equal Justice Works](#) if you have additional questions about maternity leave.

- Malpractice: Host sites are required to carry malpractice insurance that covers all participating AmeriCorps Fellows. The Fellow must be covered by malpractice insurance during the entire term of service.

Supervision

Equal Justice Works expects host sites to provide effective supervision to all Fellows and Summer Corps Members. The quality of supervision as reported by the Fellows is one of the criteria Equal Justice Works uses to evaluate sites as part of the Technical Review and selection process.

While effective supervision is tailored to meet the skills and needs of specific Fellows in their roles and organizations, Equal Justice Works promotes these principles and best practices:

Prior to the beginning of the term:

- Fully explain the purpose and role of AmeriCorps Fellows to all staff in the organization.
- Prepare an orientation and meetings with keys staff and partners. Determine the training needed for the specific legal work the Fellows will perform.
- If Fellows are ending terms, plan to transition projects from one Fellow to another.

At the beginning of the term:

- Immerse the Fellows in activities and conversations from the first day of service. Sign all contracts and submit all paperwork on the first day.
- Stick to set times/days to meet with Fellows, preferably weekly at first. Ask them to prepare materials for your meetings. Resist the urge to maintain an open door policy in lieu of scheduled meetings. Advise Fellows to develop solutions and save up discussion topics rather than emailing or stopping by your office many times a day.
- Use the performance measures to develop a workplan with the Fellow. Use the workplan as a basis for supervisory meetings.
- Discuss supervision with the Fellows. AmeriCorps Fellows are adult learners. How do you engage or teach them? How do you balance giving them direction and allowing them control over the project? How do you empower the fellows? How do you help them take ownership over the experience as an Equal Justice Works AmeriCorps Legal Fellow?
- Ensure Fellows fully comprehend the financial structure of legal service providers, *pro bono* projects, and their own fellowship. Review this structure after a month of the term of service.
- Impress upon them that they are a representative of AmeriCorps, Equal Justice Works and your host site.
- Encourage fellows to get out into the community to network on their own.
- Encourage Fellows to reach out to Fellows in your area and across the country.
- Determine a suitable caseload for the Fellow, being sure to strike a balance that is ambitious but not overwhelming.

As the Fellowship progresses throughout the term:

- Discuss how well the Fellow is meeting the goals of the workplan and if it needs to be changed. Determine whether the Fellow has too much or too little to do, and emphasize the need to take on more tasks quickly.
- Provide frequent constructive and corrective feedback. Many Fellows struggle to see the impact they are having, especially in the first year of a project. In this case, consider assigning a mentor to check in periodically.

- Maintain clear expectations about what the Fellow needs to do to be invited back for a second term.
- Ensure the Fellow is taking full advantage of the opportunity to develop management, leadership, supervisory, collaboration and legal skills. If necessary, challenge them and get them out from behind their desk.
- Keep Equal Justice Works abreast of successes and challenges with the Fellows and the project.

AmeriCorps Prohibited Activities

CNCS prohibits AmeriCorps Members from completing certain activities during their service, training, or fundraising hours. Individuals may exercise their rights as private citizens and may participate in the below activities on their initiative, on non-AmeriCorps time and using non-Corporation funds. The AmeriCorps logo should not be worn while doing so. The AmeriCorps Prohibited Activities are outlined in the Fellows' Contracts, but please ensure the Fellow and his/her Supervisor carefully reviews the list before the Fellow starts service. It is important that both the Fellow and the Supervisor understand what activities the Fellow cannot partake in while serving in AmeriCorps Fellowship program. It is also important to consider the appearance of Fellows participating in these events on their own time if it is in connection with their host site.

The following is the list of Prohibited Activities outlined in CNCS regulation 45 CFR 2520.65:

- Attempting to influence 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 parties, 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;
 - A partisan political organization;
 - A nonprofit organization that fails to comply with the restrictions contained in section 501(c)(3) of the Internal Revenue Code of 1986 except that nothing in this section shall be construed to prevent participants from engaging in advocacy activities undertaken at their own initiative; and
 - An organization engaged in the religious activities described in paragraph (g) of this section, unless Corporation assistance is not used to support those religious activities;
- Conducting a voter registration drive or using Corporation funds to conduct a voter registration drive; and
- Providing abortion services or referrals for receipt of such services.

Program Management

Serving as a Fiscal Agent for other Organizations

In 2011-2012, several host sites will be serving as fiscal agents for other AmeriCorps host sites.

Organizations agreeing to serve in this capacity will be responsible for:

- Administering payroll and benefits for all AmeriCorps Fellows across the participating organizations;
- Managing the finances of the grant and submitting monthly expenditure reports;
- Assigning a Project Director to communicate with site supervisors and Fellows monthly, and convene the Fellows quarterly;
- Collecting Fellow paperwork for submission to Equal Justice Works;
- Gathering impact data from Fellows and submitting timely progress reports to Equal Justice Works;
- Serving as the communications conduit and keeping sites informed on Equal Justice Works and AmeriCorps updates, policies and deadlines;
- Maintaining basic contact with the State Commission to keep them informed about the Fellowships;
- Assisting with member selection, management, discipline and promotion as appropriate.

Equal Justice Works anticipates that reducing the number of subgrantees will create efficiencies and costs savings for many organizations, while increasing administrative burdens for others. Organizations serving as fiscal agents can only do so for other programs within their state. Depending on CNCS funding, host sites that agree to act as fiscal agents for other sites in their state may request additional administrative funds from Equal Justice Works.

Performance Measures

All AmeriCorps Programs have a set of Performance Measures (PMs) to demonstrate impact. These PMs are the basis of the Equal Justice Works AmeriCorps reports to CNCS and outline the data AmeriCorps Fellows should track day to day. During the application process, each host site outlines the PMs that it expects to fulfill by the end of the grant year. Each host site is accountable to the numbers that are self-select; each host site's results are measured against the PMs during the Technical Review process (see below). Whether or not sites are meeting PMs is one of the most important elements of the evaluation process for sites. Please ensure that all Fellows and their supervisors are aware of the PMs at the start of their term of service.

Reporting

Reporting on a Fellow's progress and successes is a vital part of the Program. It is also important to report on any challenges that either the Fellow or the host site staff are encountering. Equal Justice Works is a partner and supports the host site and Fellow to meet any challenges that may arise. Equal Justice Works requires a Mid-Year Report and an Annual Progress Report from every host site. An up-to-date calendar of reporting deadlines can be found in the AmeriCorps Reporting and Enrollment System (ARES).

Financial Reporting will be addressed in the Financial Management Section of this Manual.

Monitoring

Site Visits

Equal Justice Works conducts site visits to better understand the impact of the program, assess the effectiveness of the host site and the Fellows, and to ensure compliance with policies and regulations. Site visits are conducted on both a routine and as-needed basis. All sites will receive at least one site visit each three-year grant cycle. Site visits may include the following meetings and/or events:

- Introductory meeting with project director;
- Meeting with host site's executive director;
- Meeting with host site's fiscal administrator who handles financial systems;
- Meeting with staff that supervise Fellows' substantive projects;
- Individual interview with Fellow(s);
- A meeting with the entire team, if possible.

The visit may also include a means for assessing the community's support of value of the project, such as:

- Discussions with the State Commission of that site's state; and
- Other meetings/events as recommended by the Fellows or the project director.

Pre-Visit Review of Materials:

Prior to the site visit, it is helpful for Equal Justice Works staff and host site staff to review the background materials listed below. It may also be helpful for the Fellows to review the first three items.

- The host site's project proposal
- Performance measures and data
- The host site's progress reports to date
- The host site's approved budget for the project
- The host site's expense reports to date
- AmeriCorps Legal Fellow Files in ARES

Programmatic Review

Equal Justice Works may ask questions about and/or discuss the following with the host site staff and Fellows during the site visit:

- The project's performance, outcomes to date, challenges;
- Project governance and administration, including a review of the site's fiscal and timekeeping systems, Fellow files, and of supporting documents;
- The project's systems for evaluation and continuous improvement;
- Fellow supervision (including process for mid and end of term evaluations of Fellow, professional development plans for Fellow);
- Fellow performance, experience and satisfaction;
- "National identity" -- community knowledge and understanding of the project and Equal Justice Works AmeriCorps;
- The project's value and benefit to the community;
- Opportunities for improvement, collaboration and leveraging other resources;
- Technical assistance and other needs of the Fellows and/or project; and
- Ways for Equal Justice Works to provide additional assistance and improve communication.

Financial Review

Equal Justice Works staff wants to ensure that all host organizations maintain sound financial systems to operate the grant appropriately. Equal Justice Works staff may request to review the following types of documents:

- Timesheets for all staff who bill to the AmeriCorps grant, including those whose time is billed to the match for a specified month;
- Timesheets for all enrolled AmeriCorps Fellows for a specified period;
- Payroll ledger for a specified month;
- General Ledger print out with detail of all charges billed to federal and match share, for a specified month;
- Copy of chart of accounts for organization;
- Copy of all supporting documentation for expenses billed to match or federal share of grant for a specified month (i.e. Invoices with approval and copies of each check);
- Copy of supporting documentation for supplemental benefits expenses for a specified month;
- Documentation of revenue that is being used to fulfill the match side of the grant.
- Copy of accounting manual; and
- Copy of employee handbook.

Site Visit Follow-Up

Shortly after the site visit, usually within two to four weeks, Equal Justice Works staff will provide the host site with a report of the visit. The report will include observations and assessments of the Fellows, the project, any compliance issues or findings, and the programmatic and fiscal systems to manage the AmeriCorps grant. Finally, staff will provide suggestions for strengthening the project or grant management systems.

Equal Justice Works allows for host sites to respond to the report within 30 days of receipt. Equal Justice Works staff will review the response and provide feedback and follow-up if necessary.

Desk Audits

Equal Justice Works conducts desk audits to ensure that sites are in compliance with AmeriCorps and OMB requirements. Desk audits are conducted on both a routine and as-needed basis throughout the program year. All sites will receive at least one desk audit each three-year cycle. If selected for a desk audit, sites will be asked to submit some or all of the following documents to be reviewed by Equal Justice Works staff.

Member File Components:

- Documentation that the background check was conducted;
- Documentation that an orientation was conducted ;
- Documentation that the Mid-Term Evaluation was conducted (if applicable at time of Desk Audit);
- Time records for all AmeriCorps Legal Fellows; and
- Fellow hour chart with the following information:
 - Fellow Enrollment Date
 - Hours served as of Desk Audit Date
 - Number of weeks left in term
 - Average hours required for timely completion of term of service

Fiscal Documents:

- Timesheets for all staff who bill to the AmeriCorps grant, including those whose time is billed to the match, for a specified month
- Payroll ledger for a specified month
- General ledger print out with detail of all charges billed to federal and match share for a specified month
- Copy of all supporting documentation for expense billed to match or federal share of grant for a specified month (i.e. Invoices with approval and copies of each check)
- Documentation of revenue that is being used to fulfill the match side of the grant
- Copy of supporting documentation for supplemental benefits expenses for a specified month;
- A copy of your organizations accounting manual and/or policies

Data Collection and Evaluation Documents:

- Forms used by AmeriCorps Legal Fellows to track progress towards performance measures for a specified month

Desk Audit Follow-Up

Shortly after the host site submits desk audit documents, usually within two to four weeks, Equal Justice Works staff will determine whether costs are allowable and supported by documentation, forms are complete and compliant, and that financial and program management systems are in compliance with CNCS and OMB regulations. Equal Justice Works staff will provide the host site with a desk audit report that will include observations and assessments of the program and fiscal systems to manage the AmeriCorps grant. Staff will provide suggestions for strengthening the project or grant management systems. Equal Justice Works allows for host sites to respond to the report within 30 days of receipt. Equal Justice Works staff will review the response and provide feedback and follow-up if necessary.

Technical Review

In conjunction with the review of the next year's application, Equal Justice Works conducts a technical review of all sites. Using both objective criteria and staff assessments, Equal Justice Works staff assigns scores in categories, which are compiled into a rating system. The results are used as one element of the site selection process, and as the basis for determining which sites require site visits, desk audits, technical assistance and enhanced monitoring and support.

The technical review criteria may change from year to year. The criteria used for the March 2011 review were (and are subject to change for 2011):

- Identity: Host site understands and promotes mission of AmeriCorps and Equal Justice Works
- Reporting: Host Site routinely meets deadlines on all financial and programmatic reports
- Engagement and Responsiveness: Host site responds to requests and informs Equal Justice Works of successes and challenges as they arise
- Enrollment and Exit paperwork: Host site submitted Fellow enrollment and exit paperwork in a timely manner
- Supervision: Fellows give frequent positive feedback about on-site support and supervision
- Results and Impact: Between 1 and 5 points given based on results achieved for
 - Clients served
 - Volunteer law students
 - Volunteer lawyers
 - Outreach (clinics and workshops conducted, presentations made)

- Community partnerships
- Foreclosure Prevention (homes saved)
- Veterans served
- Quality of Fellows: Fellows returned for a second term, Fellows served as Class Representatives, Fellows garnered positive press
- Quality of Experience: Fellows generally express satisfaction with service role
- Continually Improving Program Management: Site demonstrates steady improvement in fiscal and program management; site takes on fiscal management of one or more sites
- Summer Corps Utilization: Host site provided effective supervision of Summer Corps members; host site filled and utilized slots
- Other: geographic area or other diversity considerations, State Commission and stakeholder engagement.

Financial Management

Equal Justice Works provides subgrants to qualified organizations to support AmeriCorps Legal Fellows. Depending on available funding, Equal Justice Works provides each host site \$24,200 per Fellow for their living allowance. Sometimes, Equal Justice Works is also able to provide each host site with additional funds for administrative costs. These amounts could change from year to year based on available Federal funding and the living allowance set by CNCS. The host site must be able to provide a dollar-for-dollar match to Equal Justice Works' grant amount. The match should support the costs for the member: FICA, health insurance, travel, supplies, and Supplemental benefits.

During the application process, host sites are required to develop a budget for their program. Detailed instructions for creating a budget are located in the Appendix of this Manual. Once the host site is approved to receive an Equal Justice Works grant, Equal Justice Works will approve the budget in the [Grants Management System \(GMS\)](#).

As part of the application review process and Equal Justice Works' continuous monitoring of all host sites, Equal Justice Works looks closely at each host site's financial systems. It is important for all host sites to have strong financial management systems in place to ensure program stability and success.

AmeriCorps Financial System Requirements

An AmeriCorps grant is complicated and there are strict guidelines for managing the financial aspects of the grant, mainly, the Fellow's compensation. Equal Justice Works has simplified the grant making process as by subgranting the amount for the living allowance (\$24,200 in 2011-2012). As previously noted, the living allowance must be disbursed in equal increments across a Fellow's term of service.

Key Aspects of Successful Financial Management

- The living allowance amount and supplemental benefits amount **must** be separated on the Fellow's pay stub. If your accounting system cannot accommodate this requirement, consider cutting two separate checks for your Fellows per pay period.
- The living allowance must be equally distributed across the Fellow's term of service. To calculate, take the number of months in the Fellow's term and divide by the number of pay periods during those months. If the term starts or ends in the middle of a pay period, treat that 'half' pay period as if it was a full pay period.

- Supplemental benefits should be similarly distributed. If your accounting system cannot accommodate two separate payments on the same pay stub, it is allowable to cut one check a month for supplemental benefits.
- Periodic Expense Reports should reflect actual costs (more on that below).
- Host sites should maintain documentation of all match expenses. This includes invoices for health insurance, a payroll ledger to support FICA and other payroll taxes, receipts for travel or supply purchases, and documentation for Fellow supplemental benefit expenses.

Reporting

The only financial reporting that Equal Justice Works requires is monthly submission of Periodic Expense Reports (PERs). Equal Justice Works no longer requires that host sites submit bi-annual Federal Financial Reports (FFRs).

Periodic Expense Reports (PERs)

Periodic Expense Reports are monthly reports that each host site submits to Equal Justice Works to request reimbursement for costs associated with the Equal Justice Works subgrant. Host sites should report expenses for both the CNCS Share of the budget and the Grantee Share of the budget. PERs are due to Equal Justice Works through the Grants Management System (GMS) by close of business on the second and fourth Monday of the month following the reporting period. If the due date falls on a holiday, the PER is due by close of business on the next business day. If a PER is submitted after close of business on the second or fourth Monday, it will be processed with the next set of payments.

Equal Justice Works is committed to processing all PERs within 10 days. Equal Justice Works has started using the online payment system, Anybill, to expedite payments. In most cases, a check (or direct deposit) will be cut on Thursday of the week following the due date.

Common PER Mistakes

- Claiming expenses for more than one month
- Claiming expenses for line items that were not originally budgeted for by host site
- Overdrawing on CNCS line items
- Claiming expenses that are not actual expenses for the month

Systems Corner

AmeriCorps Reporting and Enrollment System (ARES)

In 2010, Equal Justice Works launched the [AmeriCorps Reporting and Enrollment System \(ARES\)](#). The new system manages all Fellow enrollment and exit paperwork and serves as the reporting portal for the mid-year and end-of-year progress reports. The system is secure, efficient, and almost completely paperless. ARES allows host sites to manage all of the grant requirements in one place for all of their Fellows.

Fellow Enrollment Instructions

Step 1: Log into ARES

Equal Justice Works will create all logins and passwords for ARES. If you have not received your login and need to get into ARES, please email the [AmeriCorps Inbox](#).

Step 2: Complete host site paperwork

Each host site will need to complete the *Host Site* section of the ARES menu. The *Host Site* section is where host site related paperwork will be located. Please complete each applicable section. *Please note that not all sections apply to all host sites.* The MOU section only needs to be completed if you are acting as a fiscal agent for another site.

- **Subgrant Agreement, Due: September 1, 2011.** Equal Justice Works will send your site either one or two *paper* subgrant agreements via email. Although you will see a button to upload the Subgrant agreement, please submit these by **mail** to Equal Justice Works. Once Equal Justice Works co-signs the document, we will upload the fully executed version to ARES for your records.
- **Site MOU.** If your site is acting as a fiscal agent for another AmeriCorps Fellow program, please create an MOU between your site and the other host site. Equal Justice Works will review any MOUs before agreed upon by any parties. After the agreement is verified, click *upload document* under the MOU section. Click *browse* and select the file from your computer. To submit click *submit upload*.
- **Health Insurance.** Upload a copy of your health insurance policy that covers the Fellows in the program. You only need to upload one copy of the policy that lists the names of the Fellows. Click *upload document* under the *Health Insurance* section. Click *browse* and select the file from your computer. To submit click *submit upload*.
- **Malpractice Insurance.** Upload a copy of your malpractice insurance that covers any and all of the AmeriCorps Legal Fellows. Click *upload document* under the *Malpractice Insurance* section. Click *browse* and select the file from your computer. To submit click *submit upload*.
- **Union Concurrence Due: September 1, 2011.** If your site operates without a union, you must click the *View Certification* button, select *no*, and certify your selection. If your site operates with a union, click the *View Certification* button, select *yes*, and certify your selection. You must then upload the document that certifies that the union concurs with the placement of AmeriCorps Fellows at your host site. Click *browse* and select the file from your computer. To submit click *submit upload*.

Step 3: Create Fellow Accounts

Each host site will need to create an account (ARES profile) for each AmeriCorps Fellow serving at the host site. ARES uses the Fellow account to create a Fellow record in the system. For AmeriCorps Fellows serving at a site that is using another AmeriCorps host site as a fiscal agent, the fiscal agent site will create the Fellow profiles.

- At the top of screen, click "Fellows"
- On the right, click "Register new Fellow"
- Complete the first section of the profile screen to create a profile for your AmeriCorps Legal Fellow. Enter their names, email addresses, and create a simple password for each Fellow.
- Go to the bottom of screen and hit submit. An automatic email will be generated for the Fellow to complete the rest of the profile.
- The AmeriCorps Fellow will log into the system to finish the Fellow profile and manage the member file. Please note: the Fellow will not be able to complete the service contract or the supplemental benefits contract until the host site completes the Fellow project and benefits section (step 4).

Step 4: Create Fellow project and benefits section

After you create a Fellow profile, there will be a record under the *Host Fellow* section with that Fellow's name. You are now able to start preparing the paperwork for the Fellow. Click the icon  on the left of the screen next to the Fellow's name.

After you click the icon, you are taken to the AmeriCorps Fellow project home. At the top left, you will see the grant year and the name of the Fellow.

Complete the Project Description and Benefits: Due on the first day of the Fellowship.

1. Click the 'Project Description' button. There, you will list the *start/end dates* for the Fellow's term of service. This section will become part of the AmeriCorps Fellow contract.
 - a. Make sure that the Fellow's term is no longer than 365 days. For example, term of service should be from 9/1/11-8/31/12 and not from 9/1/11-9/1/12.
 - b. In the same section, the Host site should include the *position description* for the individual AmeriCorps Fellow to whom the contract applies. The position description should specify the types of duties, service activities, and assignments the AmeriCorps Fellow will be expected to complete. This should come directly from the position description that Equal Justice Works has approved. This section will become part of the AmeriCorps Fellow contract.
 - c. In the same section, you will list any *other additional benefits* (outside of Supplemental Benefits) paid in the text field provided. This includes items like local travel expenses, professional development costs, etc. These benefits will be imported into the contract both the host site and Fellow will certify.
 - d. By clicking the check box, you also will certify that the project description does not include any activities that violate the AmeriCorps prohibited activities list.
2. Click the 'Supplemental Benefits' button. You will list the amount of *Supplemental Benefits* to be paid to the Fellow for reimbursement of living expenses. Enter the amount of supplemental benefits you submitted for your budget in the field provided. If you do not know this amount, contact Equal Justice Works. You will also list the types of expenses, amounts, and the payee. This section will become part of the AmeriCorps Fellow Supplemental Benefits contract. Please review the Supplemental Benefits section of this manual for tips and compliance issues regarding Supplemental Benefits.

Step 5: Sign paperwork with Fellow

Once the above sections are complete, you can certify the documents with your Fellow.

- **Service contract:** *The service contract cannot be signed before the Project Description and Benefits section is complete.* Host site and Fellow will be bound by the terms and conditions of the contract. To certify the contract, both the host site and Fellow must click the 'Certify Contract' button on the first day of the Fellow's service term. **Hours served before signing the contract are unallowable.**
- **Supplemental Benefits Authorization.** The host site and Fellow must certify that the benefit will be used to pay for the living expenses detailed in the form. Both host site and Fellow should click the 'Supplemental Benefits' button to certify the Supplemental Benefits contract.
- **Background check certification:** The Fellow Release form must be signed by the Fellow on or before the first day of service. This certification allows for the host site to complete the required criminal background check on the Fellow.
- **Criminal background check waiver:** The host site certifies that a proper background check has been performed.

Step 6: Upload Required Documents

Either the host site or Fellow can upload the following documents in the Fellow section:

- Document of Eligibility: The acceptable list of documents can be viewed by clicking 'document'
- I-9 Employment Document
- Resume of Fellow
- Optional Documents i.e. name change documents

Fellow Exit Instructions

Step 1: Log in to ARES

Equal Justice Works will create all logins and passwords for ARES. If you have not received your login and need to get into ARES, please email the [AmeriCorps Inbox](#).

Step 2: Complete Time Log

The Fellow should complete their time log. On the main *Fellow Home* screen, click the 'Time Log' button. Enter the final date of service for the Fellow (this date should correspond with the last day of on the Fellow's contract). Enter in Service hours and Training hours in each column for each month. To submit the time log, click 'Save and Lock in'. If you need to return to this screen to enter in more time, click 'Save and Return'. Once you click 'Save and Lock in', the Time Log Certification will be populated.

Step 3: Time Log Certification & Exit Form

Both the Fellow and his/her supervisor will complete this form. Click the 'Certify Time Log' button on the *Host Fellow* home page of the specified Fellow. Please review the form to ensure that the final date of service and all service hours were properly carried over from the completed time log. By signing this form, the Fellow and supervisor are certifying the number of hours completed, that the Fellow did not participate in the AmeriCorps Prohibited Activities, the Fellow completed his/her tasks satisfactorily, and that the supervisor completed the mid-term and end-of-term evaluations.

Step 4: Fellow Exit Survey

The Fellow must complete the Fellow Exit Survey. The Exit Survey will become available when the Time Log Certification has been complete. Click the 'Exit Survey' button and complete all sections. Additionally, please confirm your post-term address by returning to the Fellow Profile by clicking the 'Profile' button in the top right corner of the screen.

Step 5: Certify the Education Award

The certifying official of your organization must complete this step of the process. For sites that operate under a Fiscal Agent, the certifying official will be at **their** organization. Click the 'Education Award' button and review the information at the top of the document. Please select an option for the Fellow's education award status and complete the information at the bottom. Click 'Certify Accept' to submit the document.

Grants Management System (GMS)

The [Grants Management System \(GMS\)](#) is how host sites submit budgets, track expenses, and submit Periodic Expense Reports (PERs).

Appendix 1: 2011-2012 Performance Measure Categories

Legal Issue Area	# of clients receiving referrals to volunteer attorneys	# of clients receiving advice and/or brief services	#of cases Fellow will directly/fully represent clients	# of clinics conducted	# of clients assisted at clinics
Housing: LL/T, public housing, homelessness					
Housing: foreclosure defense, title issues					
Immigration					
Family law/Domestic violence					
Community economic development					
Individual rights (civil rights, disability, etc.)					
Education access					
Health/Medical					
Criminal					
Public benefits					
Other					
Other					
Other					
Totals					

Pro bono management, community building

# of volunteer law students	# of volunteer lawyers	# of other community volunteers	# of community organizations with whom the Fellows will work

Appendix 2: Sample Monthly Time Log

AmeriCorps Legal Fellow Name (please print): _____

Site Name (please print): _____

Month: _____

Week Date	Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	Sun.	TOTAL
Sample → 3/6	Service	3	4	2	3	0	0	12
	Training	5	4	6	5	0	2	22
TOTAL								

AmeriCorps Legal Fellow signature: _____

Date: _____

Supervisor signature: _____

Date: _____

Appendix 3: Creating a Budget

Section I. Program Operating Costs

A. Personnel Expenses

Equal Justice Works recommends that you do not include staff time as match for the grant.

B. Personnel Fringe Benefits

Equal Justice Works recommends that you do not include staff benefits as match for the grant.

C. 1. Staff Travel

Equal Justice Works recommends that you do not include staff travel as match for the grant.

C. 2. Member Travel

Submit these costs as match. Describe the purpose for which AmeriCorps Legal Fellows will travel. Allowable costs under this category are transportation, lodging, subsistence and other related expenses for Fellows to travel outside their service location or between sites. Costs associated with traveling locally, such as bus passes to local sites, and mileage reimbursement for use of car, may be included in this category. Remember, Equal Justice Works will cover the travel-related costs of attending the Leadership Development Training in 2011 and the ABA/Equal Justice Conference in 2012. Be sure to request or provide sufficient travel funds for AmeriCorps Legal Fellows to perform their duties.

D. Equipment

Equal Justice Works recommends that you do not include equipment as match for the grant.

E. Supplies

Submit these costs as match.

F. Contractual and Consultant Services

Equal Justice Works recommends that you do not include consulting costs as match for the grant.

G. 1. Staff Training

Equal Justice Works recommends that you do not include staff training as match for the grant.

G. 2. Member Training

Submit these costs as match. Include the costs associated with the training of AmeriCorps Legal Fellows that will support them in carrying out their service activities, e.g., Continuing Legal Education (CLE) courses and other local Bar trainings.

H. Evaluation

Leave this section blank.

I. Other Operating Costs

Submit these costs as match. Allowable costs in this category may include travel to CNCS-sponsored meetings and background checks of AmeriCorps Legal Fellows. In addition, these costs may include office space rental, utilities and telephone, and Internet expenses that are specifically used for AmeriCorps Legal Fellows, directly involve AmeriCorps project staff, and are not part of the organization's administrative/indirect costs. If shared with other projects or activities, you must prorate the costs equitably.

Total, Section I: Describe the match contributions for Section I by clearly indicating the source(s), the type of contribution (cash or in-kind), the amount (or estimate), and the intended purpose of the match.

Section II. Member Costs

A. Living Allowance

Submit these costs in the CNCS column. The living allowance for 2011-2012 is \$24,200. Multiply this amount by the number of AmeriCorps Legal Fellows requested.

B. Member Support Costs

Consistent with the laws of your state, you must provide Fellows with the benefits described below.

FICA. Calculate the FICA at 7.65% of the total amount of the living allowance.

Workers' Compensation. Some states require Workers' Compensation for AmeriCorps Legal Fellows. If you do not pay Workers' Compensation you must obtain Occupational, Accidental, Death and Dismemberment coverage for AmeriCorps Legal Fellows to cover in-service injury or incidents.

Health Insurance. You must offer health care benefits to full-time AmeriCorps Legal Fellows in accordance with AmeriCorps requirements.

Supplemental Benefits. While Equal Justice Works honors the AmeriCorps principle of a modest living allowance, we also seek to promote livable wages for all lawyers serving in the public interest. All host sites must provide \$12,000-\$22,000 per year to AmeriCorps Legal Fellows in supplemental benefits. Common supplemental benefits include rental assistance or payments toward mortgage or education loans, although any bills are acceptable.

All match for this section must be cash.

Section III. Administrative/Indirect Costs

Submit these costs in the CNCS column. In 2010-2011, Equal Justice Works requested CNCS funds for organizations that serve as fiscal agents for all of the Equal Justice Works AmeriCorps Fellowship placements in the state. This funding was contingent on CNCS approval and has not yet been awarded in 2011-2012.