



Welcome to

Reporting Roles & Responsibilities for AmeriCorps VISTA Projects

To join the audio portion by phone, please dial: **888.483.1644**
Passcode: **6245241**

***While you wait, share in the chat box:
Describe how you feel about reporting in
one word?***



Dial: **888.483.1644**

Passcode: **6245241**

Tips for Participating

- Audio broadcast by phone and online
- View Closed Captions in the Media Viewer panel
- Share comments and ideas in the Chat panel. (send to “All Participants”)
- Ask questions in the Q&A panel. (send to “All Panelists”)
- Links and recording will be available after the session

Click this button if you don't see the chat panel.

The screenshot shows a meeting interface with a top navigation bar containing icons for Participants, Chat, Q&A, and Media Viewer. A red arrow points to the Chat icon. Below the navigation bar, the Chat panel is expanded, showing a 'Send to' dropdown set to 'All Participants' and a 'Send' button. Below the chat panel, a Media Viewer panel displays a video transcript.

Performance. Because if people know what their goals are they know what the development level is and you know what the appropriate leadership style is now you have to what? Agree on that style so that you can really be their partner. And when we talk about partnering one of the first things that you're gonna have to do is to teach them the leadership model. Because you know, we



Welcome to

Record Keeping & Reporting for AmeriCorps VISTA Projects



Where are you located?

Click to display
Annotation
Tools



Use Pointer



Today's Speakers



Greg Ericksen

California State Office,
Corporation for
National and
Community Service



Rob Cox

Program Specialist,
Corporation for
National and
Community Service

Session Goals

By the end of the webinar, you will be able to:

- List tasks for member record keeping and project reporting
- Locate your project's performance measures
- Access reporting resources
- Identify where to go for support and assistance with reporting

The Importance of Performance Measurement and Reporting



Reporting Tasks

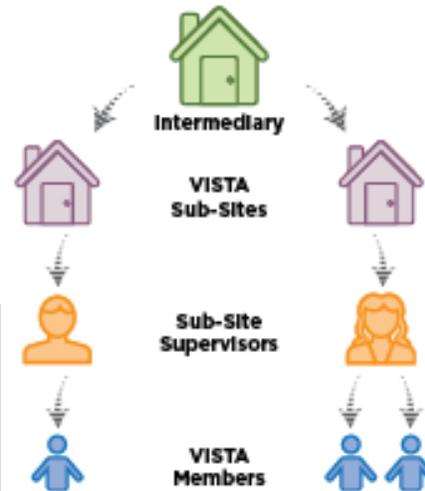
1. Monitor attendance and use of leave days (+ telework)
 - ✓ Complete Sponsor Verification Form in eGrants
2. Monitor progress and collect data in relation to your performance measures
3. Report through PPR & VPRS in eGrants
4. Track and share news and accomplishments

Reporting Roles

Sponsoring Organization (Intermediaries & Single Sites)

- Manages data collection & reporting across all sites
- Cleans and compiles data from all sites
- Submits Sponsor verification form & financials
- Submits project reports quarterly and semi annually via eGrants

Sponsoring Organization



Members

- Assists with collecting data using data collection tools provided by project
- Tracks activities via the VISTA Impact App (optional)

VISTA Sub-sites

- Tracks and collects data using data collection tools provided by project
- Submits data for bi-weekly for Sponsor Verification
- Cleans data before sending
- Sends data/reports to Sponsor as indicated by partnership agreement (MOU)

Reporting Timeline



eGrants

- Access and permissions vary, check with your Sponsoring Organization's Grantee Administrator
- Find job aids for the current version of eGrants at:
<https://www.vistacampus.gov/supervisors/egrants>

On Demand Webinar:
"eGrants Demystified:
The Insider's Guide"



1. Monitoring Attendance



Tracking Attendance

The Sponsor Verification Form

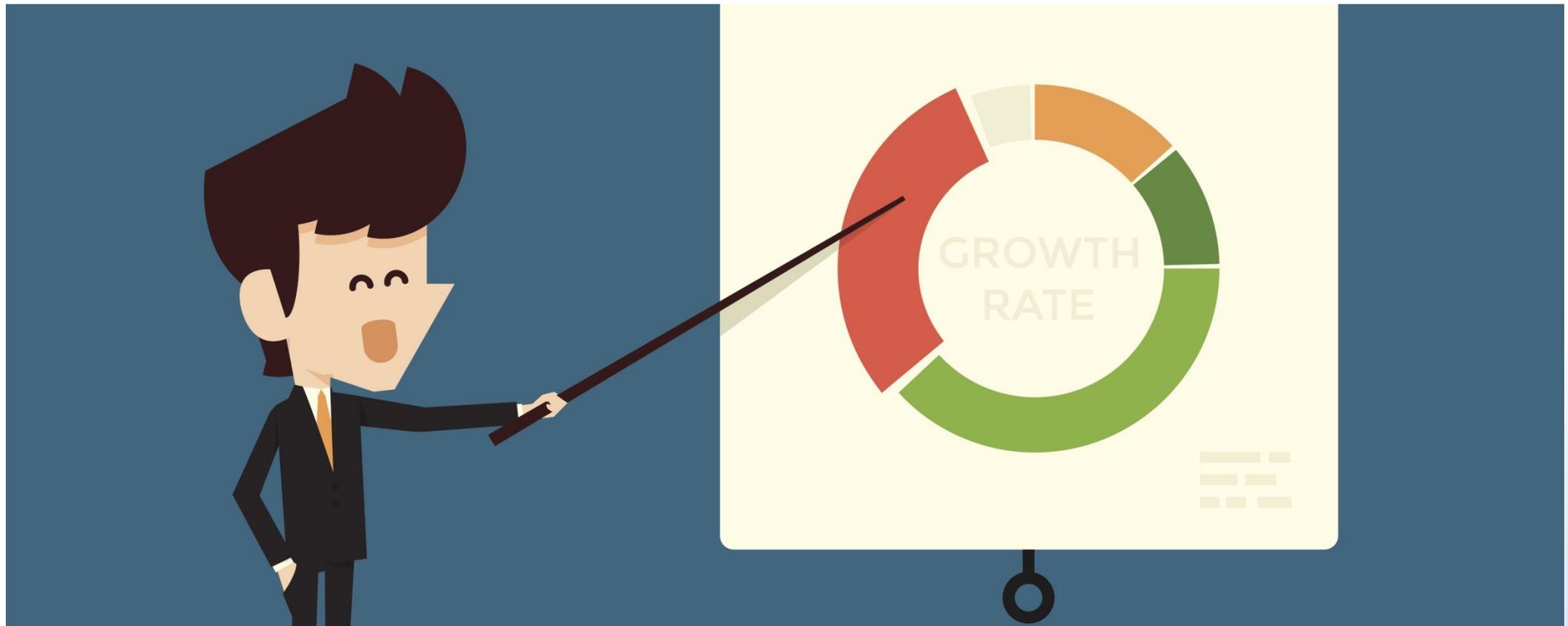
A document that lists the active VISTAs assigned to a project and their end-of-service dates.

- Submitted bi-weekly
- To comply with audit requirements, the project or site supervisor must certify the Sponsor Verification Form
- Sponsor verification is done by one person who has access to the form in eGrants
- Intermediaries need to have their own system to collection sponsor verification information from their sites bi-weekly
- See “AmeriCorps VISTA Supervisors Manual” on the VISTA Campus for detailed instructions

Poll Question

1. Choose the answer that best describes your role in completing Sponsor Verification.
 - a) I'm a sub-site that collects attendance data and sends it to the Sponsor
 - b) I'm a Intermediary Sponsor or Single-site who collects and submits attendance data in eGrants
 - c) I'm not sure but I want to learn more about my role

2. Monitoring Progress & Collecting Data for Performance Measurement



Performance Measurement



The ongoing, systematic process of tracking your project's measurable outputs and outcomes

Outputs: the amount of service provided

Outcomes: reflect the changes or benefits that occur

What describes AmeriCorps VISTA projects?

- Capacity Building Efforts
- Anti-Poverty Intentions

Tracking down performance measures

- Look for the Performances Measure in your Project Application in eGrants

Or

- Request a list from your sponsoring agency
- The Performance Measurement Module in eGrants allows you to print performance measures for each site

Data Collection for National Performance Measures

<http://www.nationalservice.gov/resources/performance-measurement/vista>

G3-3.1: Number of community volunteers recruited by CNCS-supported organizations or National Service Participants



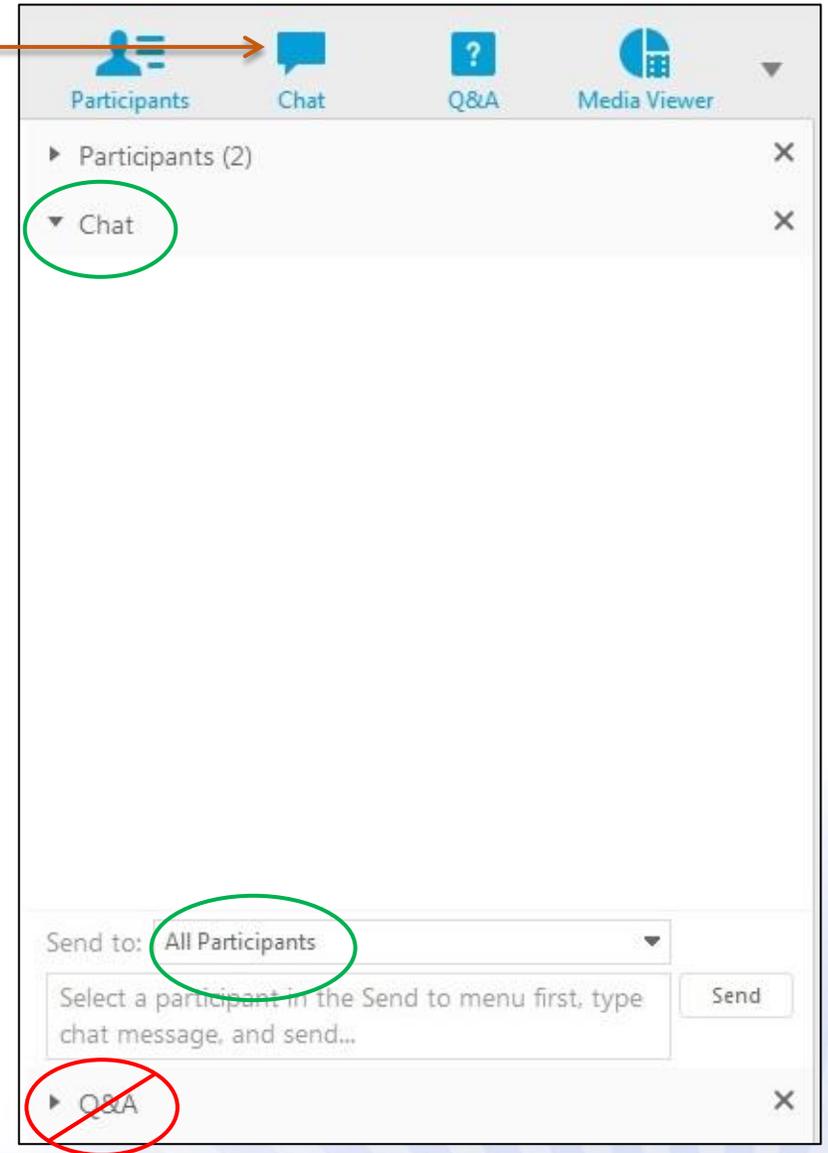
Data Collection Tips

- Process utilizes data collection methods outlined for National Performance Measures
- Tools and systems are developed and implemented from the start
- Staff and members are trained and aware of expectations

Chat Question

- How are your data collection systems organized and structured?
 - Who does what?
 - What tools do you use?

Click this button if you don't see the chat panel.



3. Reporting through PPR & VPRS



Project Progress Report (PPR)

Reflects the accomplishments (milestones) of the overall project, not the VISTAs' tasks in their VADs.

- Submitted in eGrants
- Includes qualitative and quantitative sections
- Supervisor's Narrative
- Member(s)' Narratives
- ✓ **Additionally**, a sampling of press coverage, newsletters, curriculum in hardcopy or email is sent to the State Office

PPR Reporting Periods

- First year projects report quarterly
- Second and third year projects may report semi-annually, at the discretion of the State Office
- Confirm your reporting periods and due dates with your state office

Project Period Covered:

- ▶ Oct. 1 – Dec. 31
- ▶ Jan. 1 – Mar. 31
- ▶ April 1 – June 30
- ▶ July 1 – Sept. 30

Date Report is Due:

- January 30
- April 30
- July 30
- October 30

7 Common Mistakes for PPRs

1. General Information
2. Inaccurate data
3. Data not cumulative
4. Data not supported by tools
5. Data doesn't reflect reporting period
6. Not utilizing Sponsor Notes
7. Not entering information in narrative section

PPR—What it Looks Like

egrants.cns.gov

The screenshot displays the eGRANTS portal interface. At the top left is the logo for the Corporation for National & Community Service. The main header features the 'eGRANTS' logo and a photograph of two women. Below the header, there are tabs for 'GRANTS' and 'PEER REVIEW'. A message section on the left greets 'Gregory' and mentions a grant. On the right, there are links for 'VIEW MY GRANTS/APPLICATIONS' and 'VIEW MY AMERICORPS PORTAL'. The main content area is divided into three columns: 'Change Organization', 'Managing My Account', and 'Reporting to CNCS'. The 'Reporting to CNCS' column contains links for 'Financial Report', 'Progress Report', and 'Progress Report Supplement'. The 'Progress Report' link is circled in red. At the bottom, it shows the user is currently viewing the California State Office in Los Angeles, CA.

Member Development

 Grant Number: 06VSPCA001
NOFA: FY 2016 AmeriCorps VISTA State
Application ID: 16VS185306
Legal Applicant Name: The Regents of the University of California

eGRANTS Progress Report

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

Screen Instructions

Please place screen instruction here.

VISTA PPR Member Development Information

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

Done With Section

Sponsor Note

Staff Note

[Note History](#)

Narratives

The screenshot displays the eGRANTS Progress Report interface. At the top, the logo for the Corporation for National & Community Service is visible on the left, and the Grant Number (06VSPCA001), NOFA (FY 2016 AmeriCorps VISTA State), Application ID (16VS185306), and Legal Applicant Name (The Regents of the University of California) are listed on the right. The main title "eGRANTS Progress Report" is centered. Below the title is a navigation bar with tabs for General Info, Member Development, Demographics, Narratives (highlighted), Performance Measures, and Summary/Staff Review. The main content area is titled "VISTA PPR Narratives" and includes a "Screen Instructions" box on the left. The central panel contains a list of narrative categories, each with a question mark icon and a right-pointing arrow. The "Challenges" category is highlighted in blue. To the right of the list are two text input fields labeled "Sponsor Note" and "Staff Note", and a "Note History" link below them. A legend indicates that a green checkmark means "Narrative entered" and an orange square with a question mark means "Narrative not entered".

Grant Number: 06VSPCA001
NOFA: FY 2016 AmeriCorps VISTA State
Application ID: 16VS185306
Legal Applicant Name: The Regents of the University of California

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

Screen Instructions
Please place screen instruction here.

VISTA PPR Narratives

In this section, open each panel that you would like to utilize and describe your activities during the reporting period in more detail.

Narrative entered Narrative not entered

- Challenges
- Recruitment and Support
- Training/Technical Assistance Needs
- Partnership/Collaboration Development
- Resource Development
- Sustainability
- Multi-Site Program Management and Performance
- Other Accomplishments
- Stories
- Attachments and Links

Sponsor Note
Staff Note

[Note History](#)

Performance Measures



eGRANTS Progress Report

Grant Number: 06VSPCA001

NOFA: FY 2016 AmeriCorps VISTA State

Application ID: 16VS185306

Legal Applicant Name: The Regents of the University of California

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

Screen Instructions ✕

Place screen instructions text here.

PM52 - Capacity Building & Leverage - Full Time VISTA - Year 1

Capacity Building Performance Measures				
Measure Type	Measure #	Target	Actual	Progress
Output	G3-3.7	100	0	0.00 %
Outcome	G3-3.16	2000	0	0.00 %
# of Full time VISTAS		1	0	0.00 %

Mapped Focus Area Measures						
PM ID	Focus Area	Measure Type	Measure #	Target	Actual	Progress
53	Education - Other Education	Anti-Poverty Output	OUTPT9351	125	0	0.00 %
		Anti-Poverty Outcome	OUTCM10271	125	0	0.00 %
		# of Full time VISTAS		1	0	0.00 %

Sponsor Note

Done With Section

VISTA Progress Report Supplement (VPRS)

An annual supplement to the PPR that reports on CNCS Performance Measures in Capacity Building Activities.

- Submitted through eGrants
- Includes performance information that CNCS tracks from all Corporation programs.
- The data are aggregated and reported externally—the VPRS is not used to assess individual project progress performance.

VPRS Measures in Brief



- # hours of service contributed by community volunteers
- # organizations more effective, additional activities, new systems or processes
- Dollar value of cash/in-kind resource leveraged

VPRS Reporting

- Annual report due October 31st for the previous fiscal year (Oct. 1 – Sep. 30)
- Confer with your State Office to determine what data you will collect and report
- Establish tracking tools to collect the data
- Consider the AmeriCorps VISTA Impact App



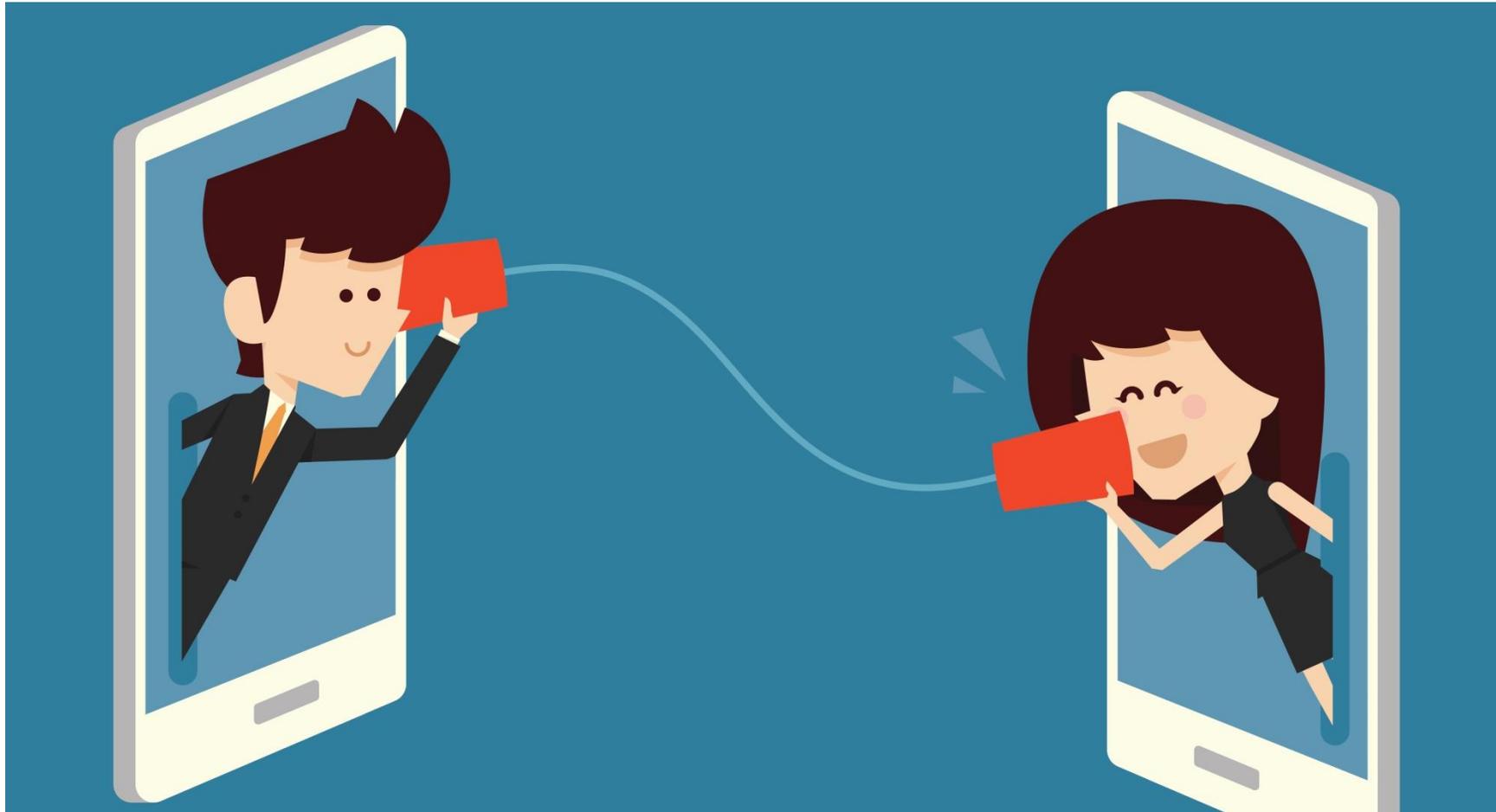
The AmeriCorps VISTA Impact App

- Assists VISTAs with tracking field data
- Data aligns with performance measures
- Use is optional

www.vistacampus.gov/impactapp



4. Share Good News & Accomplishments

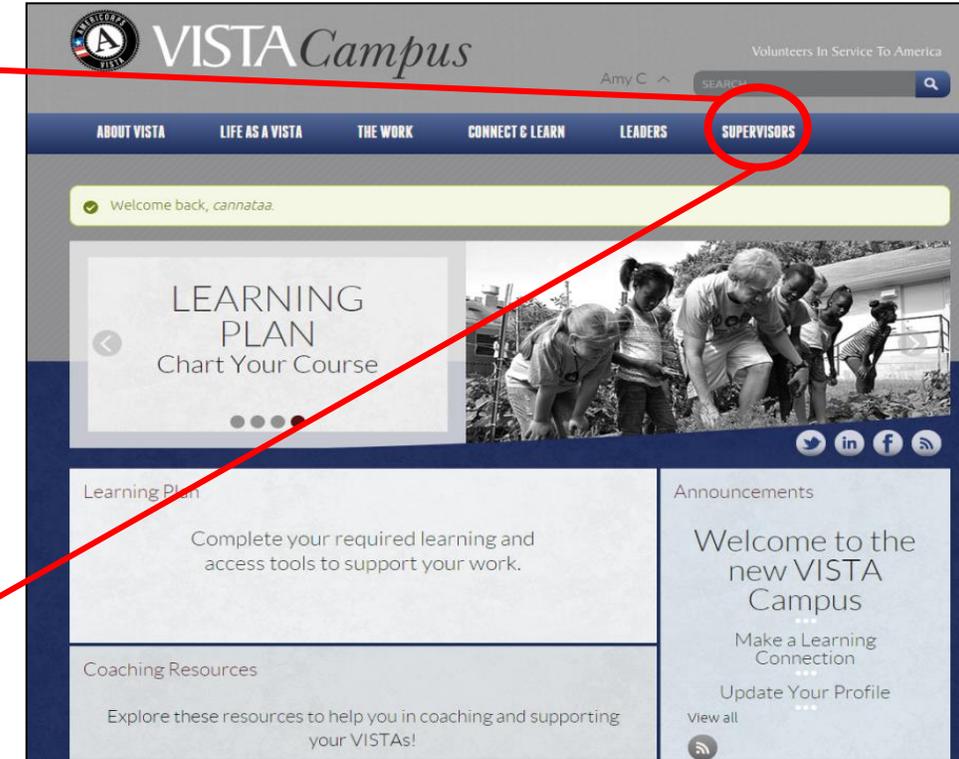


Other Items You May Need to Submit

- Federal Financial Report (FFR) (rare only 20% of programs)
 - *Step-by-step Instructions for Completing the Federal Financial Report (FFR) in EGrants*
<https://www.vistacampus.gov/resources/step-step-instructions-completing-federal-financial-report-ffr-egrants>
- Cost share reimbursement
 - *Cost Share Billing & Payment Sponsor Manual*
<https://www.vistacampus.gov/resources/cost-share-billing-payment-sponsor-manual>

VISTA Campus Reporting Resources

ABOUT VISTA	LIFE AS A VISTA	THE WORK	CONNECT & LEARN	LEADERS	SUPERVISORS
BECOMING A SUPERVISOR VISTA Supervisors Manual The Big Picture Getting Started Member Policies Contacts	SUPERVISING YOUR VISTAS The VISTA Assignment Recruiting Orienting Your VISTA Coaching and Supporting Ongoing Training Transitioning Member Handbook	OTHER Reporting and Evaluation eGrants Working with Sub-sites Supervisor Cafe Forum Supervisor Webinars Cost Share Sponsors			



www.vistacampus.gov/supervisors/reporting-and-evaluation

Where to Go for Reporting Support

1. Your Intermediary Sponsor (Sub-site projects)
2. Your State Office Program Officer (Intermediary Sponsors)
3. VISTA Campus Reporting & Evaluation Resources
 - eGrants job aids
 - Reporting Task List
 - Performance Measurement resources

Reporting Task List

www.vistacampus.gov/resources/reporting-task-list

- Customizable spreadsheet
- Organize and track due dates for VISTA project progress reports (PPR), report supplements (VPRS), sponsor-verification forms, and member milestones.

VISTA Member Task List						VISTA Reports Task List				
INSTRUCTIONS: Indicate whether task is completed in column F. Other columns auto-populate.						INSTRUCTIONS: Indicate whether task is completed in column L. Other columns auto-populate.				
Last Name	First Name	Start Date	Type	Due Date	Task Complete ('Yes' or leave blank)	Site Name	Project Start Date	Type	Due Date	Task Complete ('Yes' or leave blank)
Doe	John	7/25/2016	6 Month Performance Review	3/31/2014	Yes	XYZ	7/27/2016	Revise Tracking	10/6/2016	Yes
Doe	John	7/25/2016	Future Plans Form	6/10/2017		XYZ	7/22/2016	Q1 PPR	1/5/2017	
						XYZ	7/23/2016	Q2 PPR	4/8/2017	
						ABC	7/11/2016	Revise Tracking	7/8/2017	
						ABC	7/6/2016	Q1 PPR	NA	
						ABC	7/7/2016	Q2 PPR	7/31/2017	
						ABC	7/8/2016	Q3 PPR	10/22/2016	
						ABC	7/9/2016	Q4 PPR	1/21/2017	
						ABC	7/10/2016	VPRS	4/24/2017	
						XYZ	7/24/2016	Q3 PPR	7/24/2017	
						XYZ	7/25/2016	Q4 PPR	NA	
						XYZ	7/26/2016	VPRS	7/31/2017	
						LMN	8/8/2016	Q1 PPR	2/6/2017	
						LMN	8/9/2016	Q2 PPR	8/8/2017	
						LMN	8/10/2016	Q3 PPR	NA	
						LMN	8/11/2016	Q4 PPR	NA	
						LMN	8/12/2016	VPRS	NA	
						LMN	8/13/2016	Revise Tracking	8/31/2017	

Next Steps

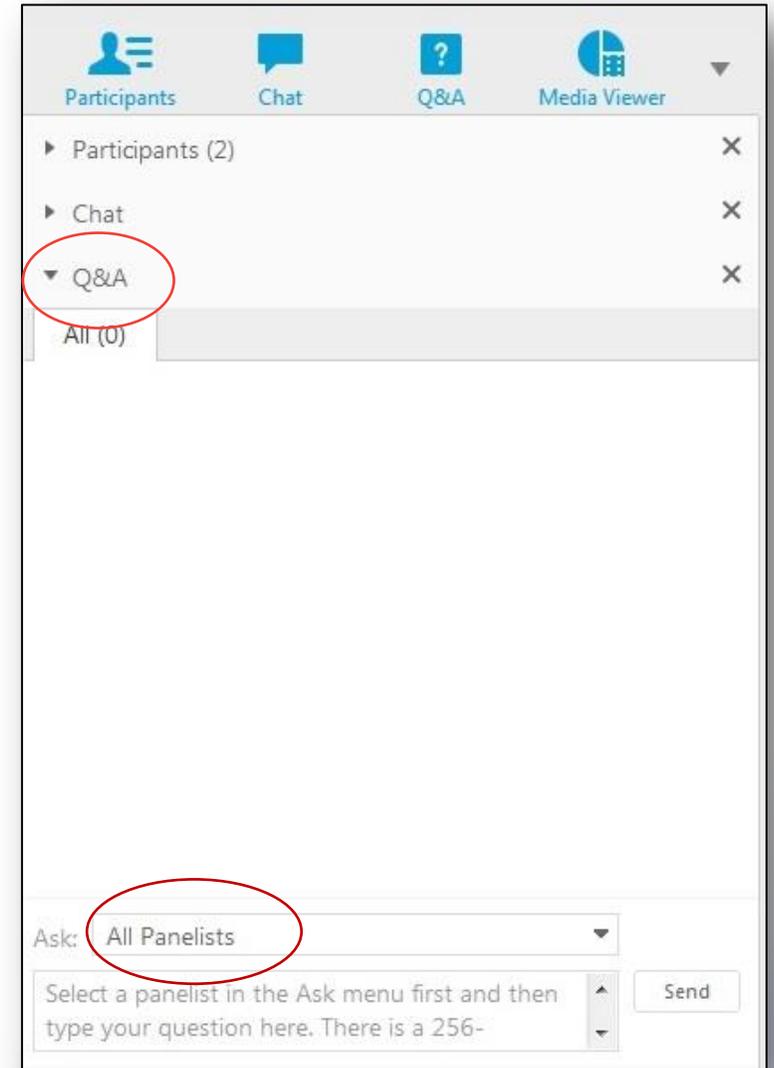
- ✓ Ensure member activities are aligned with Performance Measures
- ✓ Implement data collection strategies and train your sub-sites and teams to use them
- ✓ Download and populate the Reporting Task List
- ✓ Share good news with your State Office anytime

Evaluation

- Please take a few moments to share your feedback through the quick poll on the right side of the screen.
- How can we improve these sessions? What topics should we include in future webinars?
- Thank you very much for your time and participation!

Questions

- To ask a question verbally, call in using the number on this slide and press *1
- To ask a question electronically, use the Q&A feature located in the bottom right corner of the screen. Please ask “All Panelists”



Thank You for Your Participation!

If you have further questions or for more information, contact us:
VISTAwebinars@cns.gov

Next supervisor webinar:
Addressing Mental Health Concerns
September 8, 2016
2:00pm Eastern

Upcoming VISTA member webinar:
Project Management
August 31, 2016
2:00pm Eastern

*Visit the Webinars page on the VISTA Campus
for a schedule of upcoming webinars and recordings of past webinars*