AmeriCorps West Virginia

Tygart Valley UNITED WAY

THRIVE AmeriCorps

Site Supervisor Handbook

2026—2027

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Program Overview

THRIVE AmeriCorps Members will serve in a specialized corps focusing on Economic Opportunity. Members will provide free tax preparation services through the IRS VITA program, deliver financial literacy workshops, conduct outreach, and provide one-on-one financial coaching to residents of the Tygart Valley region. Members will be responsible for improving financial knowledge and outcomes among the low-to-moderate-income individuals served.

Position Description

The THRIVE AmeriCorps Site Supervisor will provide direct on-site supervision to Members assigned to their site and oversee day-to-day on-site operations. The Site Supervisor will advise TVUW and Members on service site policies and procedures, prepare the site for effective financial services with proper workstations and equipment, with privacy considerations, and coordinate on-site scheduling.

Duties & Expectations

The Site Supervisor is the direct supervisor of the AmeriCorps Members who are assigned to their service site. As the direct supervisor, the Site Supervisor will—

- Provide ongoing and direct supervision to assigned Members.
- Attend the AmeriCorps Site Supervisor Training.
- Confirm operating schedule with TVUW before scheduled on-site service days.
- Review, electronically sign, and submit Member timesheets by noon on every Monday.
- Meet individually with assigned Members on an as-needed basis.
- Submit AmeriCorps Member Mid-Term and Final Evaluations. These evaluations should be discussed with Members during individual meetings so that any necessary modifications can be made.
    - This is a federal audit point and is very important that it is completed and submitted on time.
    - Mid-Term Evaluations for half-time Members are due ***March 4th, 2027***. Evaluations for full-time Members are due ***April 16th, 2027***.
      ***Please note:** These dates are subject to change. All Members and Program Staff will be notified in advance of any changes.*
- Maintain open and ongoing communication with AmeriCorps Staff regarding Member performance and Program progress.
- Ensure that Members in violation of the Member Code of Conduct are disciplined in a manner consistent with the Discipline Policy outlined in their contract. All disciplinary actions (verbal or written) must be documented, with the documentation sent to the Program Manager.
- Report any concerns, issues, or work-related accidents to THRIVE Staff immediately and complete an incident report (if applicable).
- Follow the AmeriCorps guidelines for allowable, unallowable, and prohibited activities.
- Monitor Members regarding AmeriCorps prohibited and unallowable activities.

Program Policies & Procedures

It is the Site Supervisor's responsibility to become familiar with the policies and procedures set forth in this Handbook. These policies and procedures are designed to help Members be more effective in working with clients, Program staff, and blending into the operation of the service site. Violations of any of these policies can lead to termination. THRIVE AmeriCorps reserves the right to modify, add, or delete any policy or procedure at any time. We will notify you of these changes as they occur.

Open Door Policy

AmeriCorps encourages Members to bring their concerns, questions, and suggestions to THRIVE Staff. We value your input, and we want to resolve any problems that may develop. We do ask that such discussions occur at a time and place which will not interfere with the delivery of our Program's services or with other service site operations.

Non-Discrimination

It is the policy of AmeriCorps that equal opportunity will be provided, promoted, and ensured for all qualified persons. AmeriCorps will take affirmative action to ensure that all applicants receive fair consideration for service and that Members are treated equitably during their term of service without regard to color, race, religion, sex, age, national origin, sexual orientation, or any physical or mental disability or status as a special disabled veteran or veteran of the Vietnam era.

Harassment

Harassment is a violation of policy. It is also prohibited under Title VII of the Civil Rights Act of 1964, as amended, and Title IX of the Education Amendments of 1972. You have a right to an educational or work environment that is free of bias, intimidation, or hostility. AmeriCorps Members are obligated to report an allegation of harassment to his/her supervisor. If you feel you are being subjected to harassment, THRIVE AmeriCorps urges you to immediately contact your Site Supervisor, an AmeriCorps Program Coordinator, the AmeriCorps Director, or the Equal Opportunity Officer. AmeriCorps Members are expected to act professionally at all times during their service. The use of inappropriate language or behavior at the service site is prohibited. Members are prohibited from engaging in any activity that may physically or emotionally damage other Members, staff, or youth in the program or community.

Threats of Violence

THRIVE has a zero-tolerance policy on violence. All threats of violence, whether against another person or against self, will be taken very seriously. Any Member who threatens violence against another person will be immediately removed from the site and placed on suspension without compensation or extension of service until the matter can be fully investigated. THRIVE Staff will thoroughly investigate the matter to determine the appropriate course of action, which could include termination from the Program.

Drug-Free Workplace

Members are prohibited from being under the influence of alcohol or illegal drugs, or possessing or using any illegal drugs or consuming alcoholic beverages during the performance of service activities. Any AmeriCorps Member coming to service under the influence of any controlled substance will be automatically terminated. As an AmeriCorps Member, you are bound by AmeriCorps' policy on substance abuse. Any Member who has

been charged or convicted under any criminal drug statute or alcohol related offense must notify the AmeriCorps Director in writing no later than five (5) calendar days after such charge or conviction.

Prohibited Activities

45 CFR § 2520.65

(a) While charging time to the AmeriCorps program, accumulating service or training hours, or otherwise performing activities supported by the AmeriCorps program or AmeriCorps, staff and members may not engage in the following activities:

(1) Attempting to influence legislation;
(2) Organizing or engaging in protests, petitions, boycotts, or strikes;
(3) Assisting, promoting, or deterring union organizing;
(4) Impairing existing contracts for services or collective bargaining agreements;
(5) Engaging in partisan political activities, or other activities designed to influence the outcome of an election to any public office;
(6) Participating in, or endorsing, events or activities that are likely to include advocacy for or against political parties, political platforms, political candidates, proposed legislation, or elected officials;
(7) Engaging in religious instruction, conducting worship services, providing instruction as part of a program that includes mandatory religious instruction or worship, constructing or operating facilities devoted to religious instruction or worship, maintaining facilities primarily or inherently devoted to religious instruction or worship, or engaging in any form of religious proselytization;
(8) Providing a direct benefit to—
  (i) A business organized for profit;
  (ii) A labor union;
  (iii) A partisan political organization;
  (iv) 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;
  (v) An organization engaged in the religious activities described in paragraph (g) of this section, unless AmeriCorps assistance is not used to support those religious activities; and
(9) Conducting a voter registration drive or using AmeriCorps funds to conduct a voter registration drive;
(10) Providing abortion services or referrals for receipt of such services; and
(11) Such other activities as AmeriCorps may prohibit.

(b) Individuals may exercise their rights as private citizens and may participate in the activities listed above on their initiative, on non-AmeriCorps time, and using non-AmeriCorps funds. Individuals should not wear the AmeriCorps logo while doing so.

Census Activities: AmeriCorps Members and volunteers associated with AmeriCorps grants may not engage in census activities during service hours. Being a census taker during service hours is categorically prohibited. Census-related activities, i.e., promotion of the census or education on the importance of the Census.

Non-Duplication and Non-Displacement

Non-Duplication

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

Non-Displacement

An employer may not displace an employee or position, including partial displacement such as reduction in hours, wages, or employment benefits, because of the use by such employer of a participant in a program receiving AmeriCorps assistance.

1. An organization may not displace a volunteer by using a participant in a program receiving AmeriCorps assistance.
2. A service opportunity will not be created under this chapter that will infringe in any manner on the promotional opportunity of an employed individual.
3. A participant in a program receiving AmeriCorps assistance may not perform any services or duties or engage in activities that would otherwise be performed by an employee as part of the assigned duties of such employee.
4. A participant in any program receiving assistance under this chapter may not perform any services or duties, or engage in activities, that
    a. will supplant the hiring of employed workers; or
    b. are services, duties, or activities with respect to which an individual has recall rights pursuant to a collective bargaining agreement or applicable personnel procedures.
    c. a participant in any program receiving assistance under this chapter may not perform services or duties that have been performed by or were assigned to any presently employed worker.
    d. employee who recently resigned or was discharged.
    e. employee who is subject to a reduction in force or who has recall rights pursuant to a collective bargaining agreement or applicable personnel procedures.
    f. employee who is on leave (terminal, temporary, vacation, emergency, or sick); or
    g. employee who is on strike or who is being locked out.

Grievance Procedures

In the event that informal efforts to resolve disputes are unsuccessful, THRIVE AmeriCorps Members may seek resolution through the following grievance procedures. AmeriCorps grievance procedures may include an optional component: alternative dispute resolution. The procedures must include a hearing and binding arbitration, if necessary.

The grievance procedures are intended to apply to service-related issues, such as assignments, evaluations, suspensions, or release for cause. In addition, individuals who are not selected as AmeriCorps Members may utilize these procedures. Allegations of discrimination should be directed in writing to AmeriCorps' Office of Equal Opportunity. If the grievance alleges fraud or criminal activity, it must be immediately brought to the attention of Volunteer WV, AmeriCorps, and AmeriCorps' Inspector General.

The first step in filing a grievance is to complete the Grievance Form provided in the AmeriCorps Member Handbook and submit it to THRIVE Staff.

a. Preliminary Complaint Resolution
   Upon receipt of a Grievance Complaint Form, THRIVE AmeriCorps Staff will work with the Member to resolve the issue. If the issue cannot be resolved within 30 calendar days of the incident, both parties will enter Alternative Dispute Resolution (ADR).
b. Alternative Dispute Resolution
   - Informal Resolution: The aggrieved party may seek resolution of a grievance through alternative means of dispute resolution (ADR) such as mediation or facilitation. ADR proceedings must be initiated within 30 calendar days of the date of the alleged occurrence. The aggrieved party should present in writing a request for an ADR meeting to the AmeriCorps Director. At the initial session of the ADR proceedings, the party must be advised in writing of the right to file a grievance and the

right to arbitration. If the matter is resolved and a written agreement is reached, the party will agree to forego filing a grievance in the matter under consideration.

- Neutral Facilitation: If ADR is instituted, the process must be aided by a neutral party designated by Volunteer West Virginia who, with respect to the issue in controversy, functions specifically to aid the parties in resolving the matter through a mutually achieved and acceptable written agreement. The neutral party may not compel a resolution. The neutral party must not have participated in any previous decisions concerning the issue in dispute. Proceedings before the neutral party must be informal, and the rules of evidence will not apply. With the exception of a written and agreed-upon ADR, the proceedings must be confidential. Any decision by the neutral party is advisory and is not binding unless both parties agree. If the grievance is not resolved within 30 calendar days of initiation, the neutral party again must inform the aggrieved party of his or her right to file a formal grievance. No communications or proceedings of ADR may be referred to or introduced into evidence at the grievance hearing or arbitration stages. The neutral party may not participate in subsequent proceedings.

c. Formal Grievance Proceeding
Time Limits: Except for a grievance that alleges fraud or criminal activity, a grievance must be made no later than one year after the date of the alleged occurrence. If a hearing is held on a grievance, it must be conducted no later than 30 calendar days after the filing of such grievance. A decision on any such filed grievance must be made no later than 60 days after the filing of the grievance.

d. Arbitration
- Selection of Arbitrator: If there is an adverse decision against the party who filed the grievance, or no decision has been reached within 60 calendar days after the filing of a grievance, the aggrieved party may submit the grievance to binding arbitration before a qualified arbitrator who is jointly selected and who is independent of the interested parties. If the parties cannot agree on an arbitrator, within 15 calendar days after receiving a request from one of the parties, AmeriCorps' Chief Executive Officer will appoint an arbitrator from a list of qualified arbitrators.
- Time Limits: An arbitration proceeding must be held no later than 45 days after the request for arbitration, or if the arbitrator is appointed by AmeriCorps' Chief Executive Officer, the proceeding must occur no later than 30 calendar days after the arbitrator's appointment. A decision must be made by the arbitrator no later than 30 calendar days after the date the arbitration proceeding begins.
- Cost: In accordance with AmeriCorps regulations, the cost of the arbitration proceedings must be divided evenly between the parties to the arbitration. If the grievant prevails, the Grantee must pay the total cost of the proceeding and the attorney's fees of the prevailing party.

e. Suspension of Placement
If a grievance is filed regarding a proposed placement of a Member in a program, such a placement must not be made unless the placement is consistent with the resolution of the grievance.

f. Remedies
Remedies for a grievance filed under a procedure established by THRIVE AmeriCorps may include:
1. Prohibition of a placement of a Member; and
2. In grievance cases where there is a violation of non-duplication or non-displacement requirements, and the employer of the displaced employee is THRIVE AmeriCorps:
3. Reinstatement of the employee to the position held prior to the displacement.
4. Payment of lost wages and benefits.
5. Re-establishment of other relevant terms, conditions, and privileges of employment; and
6. Any other equitable relief that is necessary to correct any violation of the non-duplication or non-displacement requirements or to make the displaced employee whole.

g. Effect of Non-compliance with arbitration
A suit to enforce an arbitration award may be brought in any federal district court having jurisdiction over the parties without regard to the amount in controversy or citizenship.

Member Code of Conduct

The following duties & expectations constitute the Program's Member Code of Conduct:

- Members must adhere to the Member Position Description outlined above.
- Members must complete THRIVE essential functions as outlined in the Member Position Description.
- Members must complete and maintain all required documentation.
- Members must submit requested documentation to THRIVE Staff by the due date.
- Members must attend and participate fully in all assigned trainings, events, service projects, and meetings.
- Members must adhere to the service schedule and complete all Program requirements.
- Members must clock in and out daily, submit accurate timesheets, and track time responsibly.
- Members must submit to and pass a criminal background check in accordance with the TVUW policy.
- Members must wear AmeriCorps service gear while earning service time.
- Members must comply with the rules, safety, security, and standards of their service site.
- Members must follow established procedures for leave requests and schedule changes.
- Members must notify the Program Manager *at least* **one hour** before Program start time if calling in sick.
- Members must submit personal time off requests to the Program Manager *at least* **one week** in advance**.**
- Members must notify clients with scheduled appointments and any other relevant Program parties in the event of an unplanned Program closure or schedule change.
- Members must direct concerns, problems, and suggestions to Site Supervisors or THRIVE Staff.
- Members must work as team players.
- Members must actively engage with THRIVE clients and Staff during Program hours.
- Members must demonstrate professional behavior at all times.
- Members must ensure that at the conclusion of Program hours, service sites and workspaces are tidy and equipment is stored properly.

Service Site Policies

Confidentiality

If you feel that a client or fellow Member is in harm or danger, you must go to your Site Supervisor immediately. Client data and information, including financial records and service logs, may not be completed on personal computers. Information regarding clients, staff, or site operations is considered confidential and is not to be discussed outside the scope of your service. **Any violation of confidentiality may be grounds for termination.**

Technology

Service Site Equipment

All service sites are equipped with one or more of the following: a laptop, printer, and scanner. These devices are the property of TVUW and are to be handled responsibly and used only for THRIVE service activities. Any equipment condition or functionality issues should be reported to THRIVE Staff immediately.

Staff & Internal Communications

Staff and other internal communications will be conducted via Slack: a messaging app for organizations that helps connect teammates and aids in collaboration; it is available as a mobile and desktop app. Members should check their Slack daily for communications from their Site Supervisor or other Program Staff.
In case of emergency, you may contact your Site Supervisor by cell phone.

Client & External Communications

The TVUW office phone number, (304) 366-4550, is the *only* number that should be given to THRIVE clients, community members, and anyone inquiring about the Program. All email communications should be conducted using the THRIVE TVUW email address provided to you during the onboarding process. This email is only to be used for THRIVE-related communications. **Do not** give any personal contact information to Program participants, including phone numbers, email addresses, or social media accounts.

Dress Code

AmeriCorps Members are expected to dress to project a professional image for the Program. Members are required to wear the AmeriCorps logo during all days of service. Nametags are to be worn at all times while serving, including resource days and service days. Nametags are considered part of the Member uniform.

Program Staff

THRIVE AmeriCorps Program Director: Casey Gilbert
Email: casey@tvunitedway.org | (304) 366-4550, ext. 102

THRIVE AmeriCorps Program Manager: Jordan Pugh
Email: jordan@tvunitedway.org | (304) 366-4550, ext. 107

Tygart Valley United Way Chief Executive Officer: Brett White
Email: brett@tvunitedway.org | (304) 366-4550 ext. 101

Discipline Policy

The Site Supervisor understands that the following chart describes the Program's Code of Conduct and disciplinary procedures for violating that code.

Level One Violations	Level Two Violations	Level Three Violations	Level Four Violations
Tardiness Failure to wear appropriate attire Late submissions of requested documentation Offenses as determined by THRIVE Staff	No-shows and absenteeism Being argumentative with THRIVE Staff Inappropriate language or actions with clients, fellow Members, or THRIVE Staff Offenses as determined by the THRIVE Staff	Harassment Unauthorized contact with clients (including email, text, and contact outside THRIVE activities) Misrepresenting affiliation with THRIVE, the site, or AmeriCorps Offenses as determined by THRIVE Staff	Failure to notify THRIVE Staff of any criminal arrest or conviction within five (5) days Threats of violence Possessing, consuming, or being under the influence of illegal substances or alcohol during service Possession of firearms or weapons Failure to cooperate in any THRIVE investigation Offenses as determined by THRIVE Staff

***Please note**: Some Member actions or behaviors may result in immediate termination at the discretion of AmeriCorps Program Staff.*

45 CFR 2522.230

LEVEL ONE VIOLATION GUIDELINES

Step One	The Site Supervisor will meet with the Member to discuss the violation, review the Code of Conduct, and suggest corrective behavior. This must be documented on a Level One Warning Form and signed by both the Member and Site Supervisor. The original must be given to the AmeriCorps Program Manager and copies given to the Member and Site Supervisor within 3 working days. If necessary, appropriate training will be assigned. If a violation occurs again, proceed to Step Two Guidelines.
Step Two	The Site Supervisor will meet with the AmeriCorps Program Manager and Member to discuss the violation, review the Code of Conduct, and suggest corrective behavior. This must be documented on a Level Two Warning Form, signed by the Site Supervisor, Member, and AmeriCorps Program Manager. The original must be given to the AmeriCorps Program Manager and copies given to the Member and Site Supervisor. If appropriate, an Action Plan will be completed. If needed, training will be assigned, and if a violation occurs again, proceed to Step Three Guidelines.

Step Three	An immediate meeting at Tygart Valley United Way's office with the Site Supervisor, AmeriCorps Program Manager, and the AmeriCorps Program Director may be involved, if appropriate, to review or complete an Action Plan. Possible suspension (without pay and benefits), termination, or referral to the Member Assistance Program (MAP) for counseling or mandatory training may result. If a violation occurs again, proceed to Step Four Guidelines.
Step Four	Immediate suspension without pay or benefits and possible termination. Mandatory counseling and/or training.

LEVEL TWO VIOLATION GUIDELINES

Step One	The Site Supervisor will meet with the AmeriCorps Program Manager and Member to discuss the violation, review the Code of Conduct, and suggest corrective behavior. This must be documented on a Level Two Warning Form, signed by the Site Supervisor, Member, and AmeriCorps Program Manager. The original must be given to the AmeriCorps Program Manager and copies given to the Member and Site Supervisor. If appropriate, an Action Plan will be completed. If needed, training will be assigned, and if a violation occurs again, proceed to Step Three Guidelines.
Step Two	An immediate meeting at Tygart Valley United Way's office with the Site Supervisor, AmeriCorps Program Manager, and the AmeriCorps Director may be involved, if appropriate, to review or complete an Action Plan. Possible suspension (without pay and benefits), termination, or referral to the Member Assistance Program (MAP) for counseling or mandatory training may result. If a violation occurs again, proceed to Step Three Guidelines.
Step Three	Immediate suspension without pay or benefits and possible termination. Mandatory counseling and/or training.

LEVEL THREE VIOLATION GUIDELINES

Step One	An immediate meeting at Tygart Valley United Way's office with the Site Supervisor, AmeriCorps Program Manager, and the AmeriCorps Director may be involved, if appropriate, to review or complete an Action Plan. Possible suspension (without pay and benefits), termination, or referral to the Member Assistance Program (MAP) for counseling or mandatory training may result. If a violation occurs again, proceed to Step Four Guidelines.
Step Two	Immediate suspension without pay or benefits and possible termination. Mandatory counseling and/or training.

LEVEL FOUR VIOLATION GUIDELINES

Step 1	Immediate suspension without pay or benefits and possible termination. Mandatory counseling and/or training.

Program Calendar

THRIVE AmeriCorps Program Timeline (2026—2027)	
Event	**Date(s)**
FT Member Recruitment	9/01/2026—10/1/2026
Program Start Date	10/1/2026
FT Member Onboarding	10/1/2026—10/30/2026
FT Member First Day of Service	11/2/2026
FT Member Training & Orientation	11/02/2026
FT Member First Day On-Site	11/03/2026
HT Member Recruitment	10/30/2026—11/30/2026
HT Member Onboarding	12/1/2026—12/31/2026
HT Member First Day of Service	1/4/2027
HT Member Training & Orientation	1/4/2027
HT Member First Day On-Site	1/5/2027
MLK Day of Service	1/18/2027
HT Member Mid-Term Evaluations	3/4/2027
FT Member Mid-Term Evaluations	4/16/2027
HT Member Last Day of Service	5/24/2027
HT Member Exit Process	5/24/2027—5/31/2027
FT Member Last Day of Service	9/17/2027
FT Member Exit Process	9/17/2027—9/30/2027
Program End Date	9/30/2027

***Please note:** This schedule is subject to change at the discretion of THRIVE AmeriCorps Staff. Schedule adjustments will be made on an as-needed basis, and Members will receive as much advance notice regarding any schedule changes as possible.*

Site Supervisor Training Plan

THRIVE AmeriCorps Site Supervisor Training Plan (2026—2027)				
Event	**Date**	**Time**	**Location**	**Notes**
On3Learn Trainings Deadline	11/02/2026	Self-Paced	Online	AmeriCorps 101, Prohibited/Allowable Activities
Service Site Orientation	11/03/2026	9am — 5pm	Assigned Site	Fairmont, Grafton, Parsons, Philippi, or Elkins

***Please note:** Attendance and/or completion of all trainings listed above is required.*

Appendix

Appendix 1: Absent/Tardy Report

THRIVE AmeriCorps Absent/Tardy Report

What is the purpose?
- This form is used to record a Member's absence or tardiness at their service site.

Who is responsible for this?
- This form is to be completed by the Site Supervisor or an AmeriCorps Program Manager or Director.

When does this need to be done?
- This form is completed when a Member is absent or tardy from their service site.

Where can I find this?
- This form can be found in the Member Handbook, Site Supervisor Handbook, or in the AmeriCorps section of the Member's Only website.

THRIVE AmeriCorps Absent/Tardy Report

Member Name: _____ Site: _____

Date of Absence/Tardy: _____
Please check the appropriate lines below:

_____ Member was tardy as outlined by the standards set in the Site Expectations and previously reviewed with the Member
____Member telephoned Site Supervisor. Member Explanation _____
____Member did not telephone Site Supervisor.

_____ Member was absent on the above date without a leave request
____Member telephoned Site Supervisor. Member Explanation _____
____Member did not telephone Site Supervisor.
****Please attach a Level Two warning****

_____ _____
Member Signature Date

_____ _____
Site Supervisor Signature Date

Please email this report to your AmeriCorps Program Manager at jordan@tvunitedway.org.

Appendix 2: Leave Request Form

AmeriCorps Leave Request Form

Serving with AmeriCorps is not a typical job, and THRIVE AmeriCorps does not grant vacation days.

If you must request time off during your service term, this form must be **signed by your Site Supervisor** and **submitted to your Program Manager** at least **one week in advance** of your request for time off.
It is your responsibility to make up any hours missed due to absence.

- There is no guarantee that your request will be approved.
- The Site Supervisor can deny leave if the Member is needed on site, or
- The AmeriCorps Program Manager can deny leave if the Member is behind on contractual obligations.
- Requests will be taken on a case-by-case basis after conferring with your Site Supervisor.

AmeriCorps Leave Request Form

Member Name: _____ Date: _____

Reason for Absence: _____

Dates to be Absent:_____

Plan to Make Up Hours Missed: _____

_____

_____

_____
Site Supervisor Signature

OFFICE USE ONLY

Date received by AmeriCorps Manager: _____

AmeriCorps Program Manager's Initials: Approved _____ Denied _____

Member Notified- Initials: _____ Date:_____

Appendix 3: Member Evaluations

Mid-Term Performance Evaluation

Mid-Term Review

Member Name: _____ Service Site: _____

Directions: Based on performance information, the Reviewer should circle the number that most closely describes the Member's effectiveness in meeting each of the criteria.	Clearly Outstanding	Exceeding Expectations	Satisfactory	Needs Improvement	Needs Significant Improvement
Interactions with Program Staff & Service Site personnel.	5	4	3	2	1
Interactions with Program participants and/or community members.	5	4	3	2	1
Sets priorities, anticipates needs, and avoids schedule conflicts.	5	4	3	2	1
Completes and submits all required paperwork and database entry in a timely manner.	5	4	3	2	1
Demonstrates concern for the quality, accuracy, and completeness of tasks performed (including data).	5	4	3	2	1
Establishes and keeps clear boundaries with clients and staff.	5	4	3	2	1
Improves program-specific skills during course of service.	5	4	3	2	1
Dependable and can be counted upon to carry out duties and report to service on time, regularly, and consistently.	5	4	3	2	1
Demonstrates initiative in relation to assignments and service activities.	5	4	3	2	1
Presentation of self in attire, demeanor, and attitude.	5	4	3	2	1
Creative and/or resourceful in problem-solving.	5	4	3	2	1
Demonstrates group leadership and facilitation skills.	5	4	3	2	1
Member communicates well about issues that arise.	5	4	3	2	1
Responsive to suggestions and supervision.	5	4	3	2	1
Member demonstrates an awareness of the diversity of clients and staff and interacts well with those of diverse backgrounds.	5	4	3	2	1

Mid-Term Performance Evaluation

1. Please illustrate some of the significant impacts that this AmeriCorps Member has had with clients. Specifically, in what ways have clients' financial literacy or outcomes improved as a result of having this Member at your site?

2. Please illustrate some of the significant strengths this AmeriCorps Member has displayed at your site.

3. Please illustrate some ways this Member could improve. Please elaborate.

Reviewer Name: _____
Date of Review:_____

This form serves as an evaluation of the Member's performance to date. Once you have completed this review, please click "Submit" to send it to the Program Manager. On the email, please "cc" the Member referenced, so they have a copy for their records.

SUBMIT

Final Performance Evaluation

Final Review

Member Name: _____ Service Site: _____

Directions: Based on performance information, the Reviewer should circle the number that most closely describes the Member's effectiveness in meeting each of the criteria.	Clearly Outstanding	Exceeding Expectations	Satisfactory	Needs Improvement	Needs Significant Improvement
Interactions with Program Staff & Service Site personnel.	5	4	3	2	1
Interactions with Program participants and/or community members.	5	4	3	2	1
Sets priorities, anticipates needs, and avoids schedule conflicts.	5	4	3	2	1
Completes and submits all required paperwork and database entry in a timely manner.	5	4	3	2	1
Demonstrates concern for the quality, accuracy, and completeness of tasks performed (including data).	5	4	3	2	1
Establishes and keeps clear boundaries with clients and staff.	5	4	3	2	1
Improves program-specific skills during course of service.	5	4	3	2	1
Dependable and can be counted upon to carry out duties and report to service on time, regularly, and consistently.	5	4	3	2	1
Demonstrates initiative in relation to assignments and service activities.	5	4	3	2	1
Presentation of self in attire, demeanor, and attitude.	5	4	3	2	1
Creative and/or resourceful in problem-solving.	5	4	3	2	1
Demonstrates group leadership and facilitation skills.	5	4	3	2	1
Member communicates well about issues that arise.	5	4	3	2	1
Responsive to suggestions and supervision.	5	4	3	2	1
Member demonstrates an awareness of the diversity of clients and staff and interacts well with those of diverse backgrounds.	5	4	3	2	1

Final Performance Evaluation

1. Please illustrate some of the significant impacts that this AmeriCorps Member has had with clients. Specifically, in what ways have clients' financial literacy or outcomes improved as a result of having this Member at your site?

2. Please illustrate some of the significant strengths this AmeriCorps Member has displayed at your site.

3. Please illustrate some ways this Member could improve. Please elaborate.

Reviewer Name: _____
Date of Review:_____

This form serves as an evaluation of the Member's performance to date. Once you have completed this review, please click "Submit" to send it to the Program Manager. On the email, please "cc" the Member referenced, so they have a copy for their records.

SUBMIT

Appendix 4: Warning Forms

Member Warning Forms

Level One Warning

This Level One Warning is issued to _____ on _____(date), regarding: _____

_____

_____

_____.

Improvement Needed: _____

_____

_____

_____, by _____ (date).

Failure to comply will result in the issuance of a second warning.

_____ _____

Member Signature Date

_____ _____

Program Manager *or* Director Signature Date

Copies to: _____ Member
_____ Site Supervisor
_____ Program Manager

Member Warning Forms

Level Two Warning

This Level Two Warning is issued to _____ on _____ (date), regarding: _____

_____

_____

_____.

Specific, Measurable Improvement to be Made: _____

_____

_____ by _____ (date).

Failure to comply will result in the Member being required to develop and submit an Action Plan. I have read and received a copy of this document. I have had the opportunity to review it with my Program Manager.

_____ _____

Member Signature Date

_____ _____

Program Manager Signature Date

_____ _____

Program Director Signature Date

Copies to:
_____ Member
_____ Site Supervisor
_____ Program Manager
_____ Program Director

Member Warning Forms

Level Three Warning

This Level 3 warning is issued to _____ on (date) _____,
regarding: _____
_____
_____
_____

Specific, Measurable Improvement to be Made: _____
_____
_____
_____ by _____(date).

An Action Plan and referral to EAP for counseling or mandatory training must follow this warning, as well as possible suspension (without pay and benefits) or termination.

I have read and received a copy of this document. I have had the opportunity to discuss it fully with my Site Supervisor.

_____ _____
Member Signature Date

_____ _____
Site Supervisor Signature Date

_____ _____
AmeriCorps Program Manager Signature Date

Copies to: _____ Member
_____ Site Supervisor
_____AmeriCorps Program Manager

Appendix 5: Action Plan

THRIVE AmeriCorps Action Plan

What is the purpose?

- This form records a Member's agreement to rectify a personnel issue at their site.

Who's responsible for this?

- This will be completed by the Program Manager or Director and Site Supervisor, discussed with the Member, and signed by all parties.

When does this need to be done?

- This is done when a personnel issue arises.

Where can I find this?

- This form can be found in the Member Handbook and the AmeriCorps section of the Member's Only website.

Other important info:

The Member, Site Supervisor, and Program Manager or Director meet at the end of the Action Plan Term to review the performance and adherence to the Action Plan.

Continued on Next Page

THRIVE AmeriCorps Action Plan

Member Name: _____ Date: _____

The Member is required to follow an Action Plan due to the following: _____

_____

_____

The Member will implement the following: *(Be specific: Include dates, concrete steps, etc.)*

_____

_____

_____

_____

A review will be held with the Member, Program Liaison, Program Manager, and Program Director, if necessary, __ _____ (date).

I am aware that if I fail to follow this Action Plan, termination of my service may result.

_____ _____

Member Signature Date

_____ _____

Site Supervisor Signature Date

_____ _____

AmeriCorps Program Manager Signature Date

Copies to:
_____ Member
_____ Site Supervisor
_____ Program Manager
_____ Program Director

Appendix 6: Release Request Form

Compelling Personal Circumstances Release Request

Member Name: _____

Service Site: _____

I am applying for a release for compelling personal circumstances due to:

- ☐ Disability/Illness
- ☐ Disability/Illness or Death of Family Member
- ☐ Conditions beyond my control (natural disaster, strike, relocation, program closure)
- ☐ Military Service Obligations
- ☐ Opportunity to make the transition from welfare benefits to work

Please turn in the following:

- ☐ Last Timesheet
- ☐ End of Term Performance Evaluation (signed by both you and your supervisor)

Please take home:

- ➢ Education Award Informational Sheet

_____
AmeriCorps Member

_____
Program Director

For Office Use Only:

Hours Total: _____

- ☐ Childcare exit (if applicable)
- ☐ Healthcare exit (if applicable)
- ☐ E-mail account deleted
- ☐ Deleted from Slack

Appendix 7: Grievance Form

AmeriCorps Grievance Form

THRIVE AmeriCorps will not discriminate against any individual or group because of race, sex, religion, age, national origin, color, marital status, disability, or political belief.

Name of Complainant: _____

Address: _____

City, State, and Zip: _____

Telephone (including area code): _____

Name of Party Complaint is against: _____

Address: _____

City, State, and Zip: _____

Telephone (including area code): _____

Describe the events that caused you to file this grievance: _____

_____

_____

_____

Provisions of AmeriCorps service agreement, regulations, and/or provisions alleged to be violated: _____

_____

_____

_____

Relief sought: _____

_____

_____

_____

_____

_____ _____

Signature of complainant Date

Please email this report to your AmeriCorps Program Manager at jordan@tvunitedway.org.

Appendix 8: Media Release Request

Media Release Request

Participant Name: _____

This will confirm that the undersigned, having the sole right to do so, for good and valuable consideration (the receipt of which is hereby acknowledged), grants to United Way, its members, successors, assigns and licensees, a non-exclusive and irrevocable right to photograph, record, reproduce, publish, copyright, or otherwise use my name, photographic portraits or pictures, film, videos, internet postings, or sound recordings or any part thereof that may have been taken of me during Program as described below in written or electronic format, video or film (Content) for promotional, advertising, or other charitable purposes in any media including the world wide web related to the United Way community impact activities. This also includes any tweets or messages through social media.

You acknowledge and agree that nothing contained herein requires United Way to use any Content as described herein.

- You represent and warrant that the consent of no other third party is required to enable United Way to use the Content as described herein, and that such use will not violate or infringe upon the rights of any third parties.
- You acknowledge and agree that United Way has the right to assign this agreement and/or the rights herein (in whole or in part) to any party.
- You acknowledge that its sole remedy for any breach shall be an action for damages, and irrevocably waive any right to obtain equitable or injunctive relief.
- You waive any right of inspection, preapproval, or claims for compensation.
- You are of full age and have the right to contract in your own name and have read the above consent and permission and are fully aware of its contents. In the event you are a minor, the signature of a parent or legal guardian is required.

This Consent and Release contains the full and complete understanding between the parties and supersedes all prior agreements and understandings pertaining hereto and cannot be modified except by a writing signed by each party.

Signature: _____ Date: _____

I am the parent/legal guardian of the above-named minor, and I endorse the above statement(s) on his/her behalf.

Signature: _____ Date: _____

Appendix 9: Program Passwords

Program Account Credentials

Name: _____

THRIVE Email

Username: _____ Password:_____

Slack

Username: _____ Password: _____

America Learns

Username: _____ Password: _____

MyAmeriCorps

Username: _____ Password:_____

Basecamp

Username: _____ Password:_____

TaxSlayer

Username: _____ Password:_____

Acuity

Username: _____ Password:_____