

# The Advancement Foundation: Guide to getting started as a VISTA

Dear new VISTA,

This guide is designed to provide you with helpful information resources, orientation to our organization, tips for your work, and a clearer understanding of what your responsibilities will be as a VISTA this year. Please take the time to read this entire packet now, and email [Samantha.TAF@gmail.com](mailto:Samantha.TAF@gmail.com) if you have questions about anything you read. We are always available to help, and if we do not know the answer to your question, we will help you find someone who does.

We wish you all the best during your term!

Sincerely,  
The TAF Team



THE ADVANCEMENT  
FOUNDATION  
LEADING COMMUNITY IMPROVEMENT THROUGH NONPROFIT SUSTAINABILITY & INDIVIDUAL ADVOCACY

1114 Washington Avenue, Vinton, VA 24179 | (540) 345-1292 | [www.TheAdvancementFoundation.org](http://www.TheAdvancementFoundation.org)

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## Now that you're a VISTA...

Here are some things you'll need to know.

*Please keep this packet and the other attached documents for your reference!*

### Who do I call when I have questions about my position?

- For questions about your position, your work plan, The Advancement Foundation, site and supervisory issues, reports, or to just bounce thoughts off of someone, please don't hesitate to call your **TAF VISTA Leader at 540-345-1292**. Generally they can answer almost any of your questions about the above items or will direct you to someone who can.
- For specific technical questions about your VISTA paperwork or the status of your VISTA benefits (education award, living allowance, etc.), call the national **VISTA Member Service Unit at 800.942.2677**.

### Some important responsibilities of VISTAs:

- **Agree on a clear work hours policy with your supervisor, and keep a time sheet.** If your organization has a standard time sheet, use their format. If not, we can provide you with a template timesheet. Make sure you have a plan for informing your supervisor about when you will be out of the office, when you are expected to arrive in the morning, etc. **We will collect your timesheet along with your report.**
- **Keep good notes for reports, and make time to write them.** Reports are like grant reports for your VISTA position (which is a kind of grant), so they are very important if your site plans to receive other VISTAS in the future. You will write the report, and your supervisor will read, edit, and approve it. You should have received a set of instructions, a standard template, and a spreadsheet for these reports. Due dates are listed in the instructions.
- **Go over your work plan with your supervisor on a regular basis.** After you complete your monthly report is a good time for this important refocusing process. Are you keeping all your position's goals and objectives in view?
- **Plan to attend Team Trainings.** *Trainings are every spring and fall, and supervisors will be required to attend one of these two trainings. Details can be received from your VISTA Leader.*
- **Make sure you understand the AmeriCorps\*VISTA program's policy on political involvement.** Details are attached.
- **Get familiar with the VISTA Member Handbook.** It can answer a lot of common questions about your role in your organization, VISTA policy, and the benefits you receive.
- Remember that your goal is to build the long-term capacity of your organization, which means leaving good institutional memory about everything you've done – so that programs you've started can be continued year after year by other volunteers. Agree on an organized filing system with your supervisor, take good notes, keep copies of all important documents (*including submitted grants, financial documents, agreements, etc.*) and train volunteers and other organizational members in all that you do, when possible.

**Make sure you are familiar with the following and have it on file or know where it is kept. Several of these items are being sent to you along with this packet. Call the TAF office if at any time you need them.**

- TAF Contact List (Word doc)
- Your Work Plan and VISTA Member Assignment Description (Word docs provided by your supervisor)
- Monthly report instructions and template (one reporting Excel sheet)
- The VISTA Member Handbook (large pdf)

## A Checklist for getting situated in your new site



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### *When you arrive:*

- ✓ Open a bank account near you and ensure that your direct deposit checks are being sent to the correct account; register at <http://my.americorps.gov> to track your paperwork online.
- ✓ If you have student loans, you can apply for deferment at this same site as well.
- ✓ Update your site's phone and address info with the TAF office.
- ✓ Read over work plan and go over it with your supervisor. If there are problems with your work plan, call the TAF main office immediately.

### *Getting Started:*

- ✓ Update your site's phone and address info with the TAF office.
- ✓ Set up your time sheet.
- ✓ Read over VAD (VISTA Assignment Description) and go over it with your supervisor. If there are problems with your VAD, call the TAF main office immediately.
- ✓ Print out your TAF Contact Sheet to use as a reference for important contact info related to your position and the Team.
- ✓ Send a web-ready digital **photograph** of yourself and a copy of your driver's license to your VISTA Leader by the end of your second week of service.

### *Self-orientation and research:*

- ✓ Find out about the history of your group.
- ✓ Become familiar with any files left behind by a previous VISTA. **Read all Monthly Reports of any previous VISTA(s) in your position.** If there are no copies of monthly reports archived at your site, contact your VISTA Leader to receive copies from the archives at the TAF Main Office.
- ✓ Confirm that files relevant to your position are clearly labeled and organized. Find out how to label and add to files and make them accessible to others. If no good organizing system is in place, talk to your supervisor about developing one.
- ✓ For a good orientation to grantwriting and fundraising, visit <http://foundationcenter.org/getstarted/training/webinars/>. The Foundation Center periodically offers recorded webinars on how to research grants, approach funders, and write compelling proposals. Mark the dates of the webinars on your calendar, and remember to register ahead of time.

### *Talk to your supervisor for guidance on the following:*

- ✓ Setting up an email address with your supporting group
- ✓ Making a volunteer spreadsheet for volunteer hours including: number of volunteers, age, and how many hours they volunteered.
- ✓ How to use an existing time sheet format set up by your organization, or how to set up a new time sheet to record VISTA hours worked.
- ✓ Familiarizing yourself with the demographic characteristics of your site. This information should already be recorded the Project Narrative that your site submitted when it applied for your position – ask your supervisor. If necessary or helpful, you may want to create a fact sheet on local demographics (poverty, housing, education, population statistics, etc.)
- ✓ Acquiring, copying, updating, and/or creating membership lists for your group

*Acquiring additional assistance and benefits*

- ✓ Apply for food stamps, if you are eligible – you can do this through any social services office. Visit <http://www.ssa.gov/pubs/10101.html> for general information on the Food Stamps program and how to apply. Start by finding out you how much you may be eligible to receive at [www.foodstamps-step1.usda.gov](http://www.foodstamps-step1.usda.gov). Specific programs vary from state to state. A letter explaining your income situation as a VISTA is available at the MyAmeriCorps portal.
- ✓ Apply for housing assistance. Visit [www.hud.gov](http://www.hud.gov) for general information, and <http://www.hud.gov/renting/local.cfm> for state-specific info. Many programs have waiting lists, so be sure to check with your site supervisor to see if your site can offer any rental assistance to you.
- ✓ Find out about Low-Income Home Energy Assistance Programs in your state. Email [energyassistance@ncat.org](mailto:energyassistance@ncat.org) or visit <http://liheap.ncat.org/sp.htm> for state program information.

# Understanding The Advancement Foundation and How it Functions



THE ADVANCEMENT  
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## The Basics

The Advancement Foundation, a 501(c)3 organization, provides two primary functions to advance the lives of underprivileged citizens in the Roanoke Valley. First, the Foundation provides strategic planning, fundraising and board development for valuable health and human service organizations so that they are able to continue their critical work in the Valley. The Foundation does this by working with directors and board members to focus on building capacity and encouraging partnerships across organizations. The Foundation also works to provide long lasting social change for citizens by providing programming that allows citizen experiencing chronic poverty to create and execute a comprehensive life plan. We partner with East Mental Health to help build sustainable change in the lives of our LEAP program participants.

Annette Patterson is founder and president of The Advancement Foundation. Prior to establishing The Advancement Foundation, Annette served as Chief Development Officer for Stetson University during a \$200 Million Campaign and as Vice President for Institutional Advancement for Salem Academy and College where she led a \$75 million campaign. Annette has served as consultant for The Diocese of Richmond and trained over 30 primary and secondary schools in strategic planning and fundraising.

The Foundation works to maximize resources for our nonprofit clients. We work with nonprofits that transform the world to help them develop innovative strategies to improve their resources and expand their strategic impact in their community. The Foundation leverages all community resources for the benefit of large scale impact. Our work with these nonprofits in strategic planning, fundraising, staff and board development helps increase their capacity and strengthen sustainability.

The Advancement Foundation offers the following services to help with nonprofit sustainability and capacity building:

- Social Change Partnerships
- Board Retreats
- Nonprofit Assessment and Strategic Plan
- VISTA program management
- Workshops
- Major Gift Programs
- Fund Development Professionals on call
- The Playbook
- Personalized Forms
- Feasibility Study of Community Support and Campaign Prioritization

TAF has worked to help sustain many nonprofits including Manna Ministries, West End Center, Feeding America Southwest Virginia (formerly Southwest Virginia Second Harvest Food Bank), Big Brothers Big Sisters of Southwest VA, Katie's Place, Bristol Redevelopment and Housing Authority, Project Access, Skyline Community Action Partnership, East Mental Health and others which impact approximately 10,000 individuals per year.

There are many players involved in making VISTA positions a reality, and you are about to read about several of them. Just remember that The Advancement Foundation office will be your first touchstone for any questions about your position, your VISTA benefits and paperwork, details of VISTA placements, problems at your site, and any other big-picture questions that can't be answered by your supervisor and sponsoring organization. We are here to support you, and though we may not be able to answer some of your questions, we are likely able to direct you to someone who can.

### **The relationship between The Advancement Foundation and AmeriCorps\*VISTA**

The Advancement Foundation has been chosen to serve as an Intermediary Agency for the AmeriCorps VISTA program. As an Intermediary Agency, The Advancement Foundation manages VISTA members who are assigned different projects within the community aimed at *fighting poverty and improving the lives of disadvantaged individuals*.

VISTA members commit to serve full-time for a year at a nonprofit organization or local governmental agency, working to fight illiteracy, improve health service, create businesses, strengthen community groups, and much more. With passion, commitment and hard work, you will create or expand programs designed to bring individuals and communities out of poverty. Through The Advancement Foundation, VISTA members will have the potential to engage in service learning to the community under the guided supervision by Foundation staff and various nonprofit Directors. Projects may include, but are not limited to:

- Working alongside nonprofit staff to implement development campaigns
- Developing and implementing training materials and curriculum for volunteer orientations, use of database technology, and/or site-based procedures (IE: food distributions center's protocols)
- Coordinating and executing mass appeals to donors (direct mailings, phone-a-thons, listserv contacts)
- Strategic planning and organizational assessments
- Grant writing and funding research
- Coordinating volunteers and sponsorships for annual events, etc.

### **Understanding the role of AmeriCorps\*VISTA in relation to The Advancement Foundation and you**

AmeriCorps is a program of the Corporation for National and Community Service, an independent federal agency created to connect Americans of all ages and backgrounds with opportunities to give back to their communities and their nation.

AmeriCorps\*VISTA is a program of AmeriCorps that focuses on *capacity building in impoverished communities*. The “capacity building” focus of VISTA means that VISTA volunteers work for the lasting growth and development of organizations or projects within their host communities, rather than performing “direct service” activities like house-building or secretarial work.

The Advancement Foundation works through its partnership with AmeriCorps\*VISTA and applies to VISTA for a certain number of positions on an annual basis, and distributes those positions to non-profit organizations and projects that meet its criteria for VISTA sponsors. A large part of the work that The Advancement Foundation office does in Vinton involves managing the Team's relationship with VISTA and providing VISTA with the information it requires regarding the VISTAs who are working in the field. This includes submitting reports of all team activity to VISTA on a monthly basis.

## **Relationship between The Advancement Foundation and the Sponsoring Partner Organization**

In order to obtain a VISTA the sponsoring partner organization submits to The Advancement Foundation an application narrative and a work plan detailing what they hope the VISTA will accomplish. Every sponsoring partner organization's work plan must adhere to the Core Goals of The Advancement Foundation and should include some form of capacity building. Once a site has been approved, they are free to begin recruiting for a VISTA.

Before a VISTA is placed, the sponsoring organization has to sign a memorandum of agreement (MOA). The MOA says that each site is expected to provide an annual cost-share, supervision, office infrastructure, and at least one affordable housing option for its VISTA. It also says that you are responsible to The Advancement Foundation Team Leader, Director, and sponsoring organization. Ask your supervisor for a copy of your site's MOA.

## **Who actually contributes funds towards your VISTA position?**

Your sponsoring organization pays The Advancement Foundation a cost-share, which the main office passes on to VISTA to pay for your position. In return, your sponsoring organization gets more than \$20,000 worth of work out of you. The Advancement Foundation keeps a small portion of the cost share help fund the coordination office, which provides training opportunities, informational resources, day-to-day support, and the necessary paperwork to make sure that your position succeeds.

In return for the cost-share paid by The Advancement Foundation, AmeriCorps\*VISTA provides federal funding to pay for each VISTA's living allowance, pre-service orientation, relocation stipend, health care, child care option, and end of service award (either the educational award and interest-paid loan forbearance or the cash stipend).

## **How you fit in to this picture**

It is important for you to understand that your position as a VISTA is part of a year to year master plan between your sponsoring organization and The Advancement Foundation. Before you arrived your organization worked to develop a year-long plan for your position that meets The Advancement Foundation's core goals. Though you are only committed to one year (and we hope you will consider a second), your year of service is part of a longer-term plan at your site. Take the time to find out what year your project is in, which objectives of the project has already been completed, and what has been started but needs follow-up. Armed with this knowledge, keep in mind that someone else – either another VISTA or a community member – will eventually need to pick up many of the places where you left off. To pave the way for future project success, take care to maintain good records, write good monthly reports, and always remember to share your knowledge openly with organization members. Your work in these areas will help you to make a more lasting difference in your organization.

## **Compensation and reimbursements at the beginning of your service**

Here's an overview of when to expect your reimbursements in the first few weeks of your service.

When you arrive at your work site, please e-mail your VISTA Leader at the TAF office with your actual travel mileage and info about any shipping or hauling expenses. You will need to fax or mail your receipts for your airport parking and a Map Quest printout or other document to prove your mileage distance. Once you have done this (and provided you've correctly completed all of your enrollment paperwork) you will receive:

*Via Direct Deposit* (approximately two weeks after you arrive at your worksite).

Your first installment of living allowance -- VISTA paydays are every other Thursday.

A relocation stipend of \$550, included with your first direct deposited living allowance. This stipend is awarded if you have to move to a new housing location to begin your service, and is not dependent on relocation distance traveled. Make sure that you've submitted correct information on your Orientation Registration and Relocation form in order to receive this money.

*Via US Treasury Check* (approximately 4-6 weeks after your PSO)

Mileage reimbursement for moving and driving to the airport (federal mileage reimbursement rate is 48.5 cents/mile)

\$10 for every multiple of 100 miles you drove

Automatic \$30 for extra expenses occurred for traveling to PSO

Reimbursement for mileage to airport and airport parking

Pay stubs are delivered electronically through your MyAmeriCorps account. If you have concerns about whether you are receiving pay, you will need to check your bank records and contact the TAF office (starting with your VISTA Leader at 540-345-1292) about any problems.

### **Work-related Mileage Reimbursements**

Once you arrive at your site, be sure to speak with your supervisor about the procedure that your site uses to authorize and reimburse any work-related mileage that you drive in your own car. Sites do not reimburse VISTAs for their daily commute to work, but should reimburse you for authorized travel that you do while on the job.

## A Word About Hours and Work Schedule



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**Tracking Hours:** The AmeriCorps\*VISTA State Office requires that every VISTA keep a time sheet, and that office tells us that they're likely to collect time sheets at any time. To make sure that you are set up to track your hours, The Advancement Foundation requires that *each new VISTA submit a copy of their up-to-date time sheet along with their monthly reports.*

If your sponsor already has a standard time sheet that it uses, you can record your hours there. If not, you can use the template timesheet that should have been provided to you with this packet. (If you need a template timesheet, email or call the VISTA Leader.)

**When Should I Be Working?** It is *very important* that you talk to your supervisor early on to establish clear rules about your work schedule: what time you are expected to come to work, how you should notify your supervisor when you will be out of the office for field work, what to do if there's inclement weather, what protocol you should follow if you work from home, etc. Good, early, and frequent communication about your work schedule can help you avoid headaches or confusion later on.

**How Much Should I Be Working?** According to the VISTA Member Handbook, part of the VISTA shtick is that "Members remain available for service, without regard to regular working hours, at all times during the member's service, except for periods of approved leave." This provides flexibility for you to work on evenings and weekends to get your projects done and to interact with community volunteers who often aren't available until those times. In practice, the State Office tells us this means that VISTAs are expected to work, at a minimum, whatever hours their sponsor organization considers to be full time (usually around 40 hours per week). Most sponsoring organizations let their VISTAs take holidays whenever the rest of the organization takes a holiday. If your sponsor doesn't honor a particular holiday, even if it's federal, then you should plan to go to work on that day. Those of you who are working with small organizations and projects that have no staff need to communicate clearly and often with your supervisor to create a schedule that works for both of you.

Needless to say, even in light of the "being available at all times" talk, we all have to work within reason so that we can mind our health and lead sane lives. If you feel that your sponsor is asking unreasonable hours of you, you should get in touch with The Advancement Foundation VISTA Supervisor (540-345-1292) to discuss.

## **Electronic Resources for VISTAs**

\* **The TAF web site**, [www.theadvancementfoundation.org](http://www.theadvancementfoundation.org), is the Team's public face. Through the web site, your project has an opportunity to post information and photographs that will be seen by potential funders, members of the press, VISTA recruits, and other interested individuals.

**Within the first two weeks of your arrival, be sure to send a recent digital photograph of yourself to [recruit@accwt.org](mailto:recruit@accwt.org) for posting on the website!**

\* **The Resource Center** (<http://www.nationalserviceresources.org/>) is a CNCS sponsored website that provides the following service related resources. All resources are free of charge and most require the use of Adobe Acrobat Reader, which can be downloaded for free online.

## **Some Useful Acronyms for VISTAs**

**(Note: This list offers covers acronyms that are useful across the region. You may want to keep your own list of acronyms for state agencies and programs.)**

**TAF** – The Advancement Foundation

**CNCS** – Corporation for National and Community Service (Nationwide)

**CNS** – Commission on National Service (state entities managing state service programs)

**PSO** – Pre-Service Orientation

**QR** – Quarterly Report

**RFP** – Request for Proposals

**TAG** – Technical Assistance Grant

**VISTA** – Volunteers in Service to America

**VMSU**- VISTA Member Support Unit

**Skyline CAP**- Skyline Community Action Partnership

**FA**- Feeding America

**SWVA**- Southwest Virginia

**BBBS**- Big Brothers Big Sisters

**WEC**- West End Center

**KP**- Katie's Place

**LEAP**- Life, Educate, Advocate, and Proclaim

## **A note on VISTAs and political activities**

### **Political Activities and You**

With the Presidential elections well underway, I want to remind you of the Hatch Act. The Hatch Act is a law that addresses the rights of State and Federal employees and VISTAs to engage in certain political activities, while prohibiting other political activities.

#### **GUIDING PRINCIPLE**

A VISTA **may not** engage in political activity while on duty as a VISTA or when identifiable as a VISTA (e.g. while wearing VISTA clothing or logos, working in a venue where s/he will be recognized as a VISTA member or while using the vehicle of the VISTA project).

The issue of political activity and when a VISTA is identifiable as a member has subtle nuances and must be considered in the context of your community and project. For clarity's sake, we list below political activities in which a VISTA generally may or may not participate during his/her term of service, but please do not approach the list as a definitive checklist. If you are in doubt, please contact your local Corporation State Office representative.

**A VISTA may** (while **not** on duty and while not identifiable as a VISTA)

- register and vote as s/he chooses
- attend and be active at political rallies and meetings
- express opinions about candidates and issues
- contribute money to political organizations
- assist in voter registration drives
- sign nominating petitions
- distribute campaign literature in partisan elections
- campaign for or against referendum questions
- campaign for or against candidates in partisan elections
- drive voters to the polls (no project vehicle)
- attend political fundraising functions
- join and be an active member of a political party or club
- make campaign speeches for candidates in partisan elections
- hold office in political clubs or parties constitutional amendments, municipal ordinances
- be a candidates for public office in nonpartisan elections

**A VISTA may not**

- engage in political activity while on duty as a VISTA at a project, wearing a VISTA logo, or using a vehicle of the VISTA project or when identifiable as VISTA
- wear partisan political buttons while on duty as a VISTA
- use official authority or influence to interfere with an election
- solicit or discourage political activity of anyone with business before the VISTA sponsor or project where they serve
- solicit or receive political contributions while in their VISTA service term
- be candidates for public office in partisan elections

#### **Penalties for Hatch Act violations**

The Office of Special Counsel (OSC), an independent agency of the federal government, enforces the Hatch Act for State and Federal employees and VISTAs. The OSC determines penalties for Hatch Act violations. Any VISTA who violates the Hatch Act may be subject to severe disciplinary action of at least 30 days' unpaid suspension and up to termination for cause from the VISTA program. Please visit <http://www.osc.gov/hatchact.htm> for additional information.

While you are exercising your free speech rights be sure to keep the Hatch Act requirements in mind.