**Instructions for Completing AAA Volunteer Program Development Monitoring Tool-HCCBG and CARES**

This tool has been modified to include monitoring for HCCBG funding of the service and CARES funding. The core questions have been updated.

**For HCCBG monitoring:**

If the agency has used HCCBG codes **190:**

For full programmatic monitoring**,** complete pages 2-4.

**For CARES monitoring:**

If the agency has used CARES code **290**,complete page 5.

A full programmatic monitoring must be completed if a provider is assessed as high risk (e.g., a new provider).

**NC DIVISION OF AGING AND ADULT SERVICES AND**

**NC AREA AGENCIES ON AGING**

**Volunteer Program Development TOOL**

Community Service Provider:

Review Date: Click or tap to enter a date. State Fiscal Year:

Interviewer:

Provider Staff Interviewed and Title:

**PROGRAM ADMINISTRATION**

Provisions of the Standard (The Service Standard is referenced after each requirement)

1. The agency providing Volunteer Program Development has conducted and/or

updated an annual needs assessment to determine the need of the volunteer services within the community. Yes  No

(Service Standards, IV.1)

Documentation verifying compliance:

Comments:

2. If the needs assessment indicated the need for volunteers in the community, then the agency:

a. developed and maintained a file of potential volunteer

opportunities; Yes  No

b. designed written job descriptions for each volunteer assignment which include job title, job responsibilities, training or preparation to be provided, time and place of assignment, length of commitment, level of on-the-job supervision and name of supervisor and other pertinent

data; Yes  No

c. promoted volunteer involvement through use of the media

and other appropriate public relations techniques; Yes  No

d. interviewed volunteers for assessment of skills and

appropriate assignments; Yes  No

e. developed written procedures regarding acceptance, denial,

or termination of volunteers; Yes  No

f. negotiated time commitments from each volunteer for

each assignment; Yes  No

g. established and maintained a system of recording volunteer hours; Yes  No

h. provided orientation and training for volunteers prior to or at the

time of assignment; Yes  No

i. provided for supervision for volunteer; Yes  No

j. monitored and evaluated volunteer assignment and performance; Yes  No

k. provided formal recognition of volunteers; and Yes  No

l. developed and maintained personnel files on all volunteers. Yes  No

(Service Standards, IV, 2 a-l)

Documentation verifying compliance:

Comments:

3. The agency provides adequate insurance coverage for the volunteer providing volunteer services. Yes  No

(Service Standards, IV.)

Documentation verifying compliance:

Comments:

4. The agency maintains a log of the volunteers and their assignments. The log includes:

a. the name of the volunteer; Yes  No

b. the date of enrollment; and Yes  No

c. the volunteer’s assignment. Yes  No

(Service Standards, VI.)

Documentation verifying compliance:

Comments:

**Fiscal Verification-CARES Funds Code 290**

Agency:

Agency Staff Interviewed:

Signature of Reviewer(s):

Date:Click or tap to enter a date.

For expenses related to CARES code **290,** select a month of reimbursement in ARMS and the same month of expenses reported in the tracking spreadsheet.

1. The provider attests that use of CARES Act funding was for pandemic recovery and future emergency preparedness of this service. Yes  No

1. Reimbursement correlates with actual expenses. Take the selected month of reimbursement in ARMS and check it against actual expenses (receipts, payments documented in general ledger, other proof of purchases, etc.)

Yes  No

1. Sample month selected in ARMS:
2. Reimbursement amount for sample month:
3. Actual month’s expenses:

|  |  |
| --- | --- |
| Type of Expense | Amount |
|  |  |
|  |  |
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|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| Monthly Total |  |

1. Selected month’s reimbursement matches the reporting of expenses in the tracking worksheet for the same month. Yes  No

Documentation reviewed/Comments: