

**SURVEY RESULTS**

**PART I**

**RESPONDENTS**

TOWN ADMINISTRATOR:	5
SELECTMAN:	2
ELECTED/APPOINTED OFFICIAL:	18

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**SECTION I**

**ADMINISTRATIVE SERVICES**

- 1.) **Would you be supportive of the creation of a regionalized human resources service at Barnstable County?**
    - a. Yes - 16
    - b. No - 9
    - c.
  - 2.) **Would you be interested in Barnstable County providing accommodations for centralized beach sticker sales?**
    - a. Yes - 9
    - b. No - 15
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**SECTION II**

**BARNSTABLE COUNTY PURCHASING DIVISION**

1. *Barnstable County Purchasing Division coordinates the solicitation of collaborative bids between the towns in the County to take advantage of the cost savings in the procurement of supplies and services in large volumes. Some examples are: gasoline and diesel fuel, heating oil, roadway construction, water chemicals, among others.*

**Please check this box if you are not familiar with this service – 8 checked**

**How well does this service meet the needs of your town?**

- Pretty well - could be expanded
- good job
- Satisfied
- Very well: public safety, public works, etc.
- It works well for some items; others not so much
- Fairly well
- Moderately
- Well, thank you.
- The Service (Elaine specifically) exceeds all reasonable expectations for a regional service
- Excellent

- Some of the time
- The best ever.
- Joint Procurement is one of the most valuable services a regional government can provide for its members!
- rarely use it
- Very well. We utilize the County Bid system quite a bit.
- Excellent service provided by the County
- Harwich participates

**If this service is not being used in your town, why not?**

- Yes, extensively
- We may need to make all departments aware of the service, but I also think more of our personnel should be trained on CommBuys.
- Easier to go straight to vendor/use state bid number
- We use it as often as we can.

- 2. *The Purchasing Department provides a website <http://purchasing.barnstablecounty.org> for town to order office supplies that are bid through the County.***

**Please check this box if you are not familiar with this service. 8 checked**

**How well does this service meet the needs of your town?**

- This URL needs to be prominently displayed, not under the heading of the Purchasing Dept.
- Used some, but need exploration on best use.
- It generally meets our needs. There are some items, like toner cartridges, that are unavailable.
- Fairly
- Poorly
- Exceptionally well
- Excellent
- Fine
- Very well
- Very useful
- Moderately. Some supplies we order directly from approved vendor with County discount.
- Meets our needs.

**If this service is not being used by your town, why not?**

- Again, it would probably be used more widely if more of our staff were trained in support of procurement law.
- Again, sometimes we order directly from vendor.
- I was not aware of it, but my Department head might be.

**3.) *The Cape Cod Association of Public Purchasing Officials (CAPPO) meets monthly to provide education and training, as well as a forum for local officials, to discuss regional government procurement issues.***

**Please check this box if you are not familiar with this service. - 16 checked**

**How well does this service meet the needs of your town?**

- Very well
- Good
- Staff has attended and found meetings to be helpful, however, meeting are not held regularly.
- Excellent
- Excellent organization with knowledgeable leadership providing valuable guidance.
- Very helpful.
- Like this offering. Attended some events.
- I am not currently on the mailing list.

**If this service is not being used in your town, why not?**

- 4.) Currently, we have no MCPPO certified official in town
- 5.) Barnstable does this in house a lot or sends us if needed.
- 6.) Staff and time. The service is well respected and does a good job.
- 7.) I suspect it's an issue of not having enough staff traditioned and involved in procurement.
- 8.) Have not had time to enroll.

**4.) *Please let us know if your town is interested in participating in additional collaborative procurement. Check all that apply:***

***Vehicles – 12 checked***

***Heavy equipment – 10 checked***

***Printing Services – 8 checked***

***Other – 6 checked***

- ***Environmental engineering***
- ***IT equipment, vehicle/mechanic services, LSP, advertising***
- ***DPW materials***
- ***Fire equipment. Medical supplies***
- ***Contracts for professional services we all use, inspectional services; HVAC monitoring and maintenance; Fire alarm M & M; portable toilets; recycling; trash removal***
- ***Hour rates for responsive emergency repairs like plumbing, electrical, etc.***

**5.) *Would you be interested in having Barnstable County act as a regional procurement office to handle procurements in your town?***

**Yes – 10**

**No - 13**

**SECTION III**

**DREDGE**

**1. Were you aware that the County has purchased a second DREDGE?**

**Yes: 18**

**No: 7**

**2. Would you be interested in increasing your DREDGE usage?**

**Yes: 21**

**No: 4**

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**SECTION IV**

**EMERGING INFORMATION TECHNOLOGY SERVICES**

*Over the past several months, the IT Department at Barnstable County has been working diligently to broaden and enhance their portfolio of products, services and support to better serve constituencies throughout Barnstable County.*

**1.) Complete design solutions for voice, data and wireless information.**

- a. Highly interested. - 7
- b. Somewhat interested. - 7
- c. Not interested. - 5
- d. I require more information. - 6

**2.) Enhanced network management tools to proactively monitor the network in its entirety.**

- a. Highly interested. - 7
- b. Somewhat interested. - 10
- c. Not interested. - 4
- d. I require more information. - 4

**3.) Advanced threat protection for both internal devices and the network transport.**

- a. Highly interested. - 10
- b. Somewhat interested. - 8
- c. Not interested. - 2
- d. I require more information. - 5

**4.) IT Strategic planning with guidance technology roadmap development.**

- a. Highly interested. - 13
- b. Somewhat interested. - 4
- c. Not interested. - 2
- d. I require more information. - 6

**5.) Data center accessibility and security for hosting, backup and disaster recovery.**

- a. Highly interested. - 9
- b. Somewhat interested. - 10
- c. Not interested. - 2
- d. I require more information. - 4

**6.) Business intelligence and analytics from multiple data sources.**

- a. Highly interested. - 6
- b. Somewhat interested. - 10
- c. Not interested. - 4
- d. I require more information. - 5

**7.) Enhanced Microsoft product offerings including managed Office 365 suite with a la carte menu.**

- a. Highly interested. - 7
- b. Somewhat interested. - 11
- c. Not interested. - 3
- d. I require more information. - 4

**8.) Enhanced voice and video/VoIP offerings providing full mobility and conferencing features with a la carte menu.**

- a. Highly interested. - 7
- b. Somewhat interested. - 5
- c. Not interested. - 8
- d. I require more information. -5

**9.) Large scale online meetings with traditional call-in capability.**

- a. Highly interested. - 9
- b. Somewhat interested. - 8
- c. Not interested. - 5
- d. I require more information. - 3

**10.) Cloud storage and backup for business continuity.**

- a. Highly interested. - 7

- b. Somewhat interested. - 9
- c. Not interested. - 4
- d. I require more information. - 5

**11.) Site ISP redundancy to assure real-time failover for business opportunity.**

- a. Highly interested. - 5
- b. Somewhat interested. - 5
- c. Not interested. - 4
- d. I require more information. - 11

**12.) Server hardening and back-ups for high availability and fault tolerance.**

- a. Highly interested. - 7
- b. Somewhat interested. - 4
- c. Not interested. - 3
- d. I require more information. - 11

**13.) Infrastructure as a service, including virtual servers and desktops.**

- a. Highly interested. - 6
- b. Somewhat interested. - 5
- c. Not interested. - 4
- d. I require more information. - 10

**14.) Enhanced wireless infrastructure allowing rapid deployment of secure wireless access.**

- a. Highly interested. - 7
- b. Somewhat interested. - 5
- c. Not interested. - 3
- d. I require more information. - 10

**15.) Detailed service level agreements tied to all product offering.**

- a. Highly interested. - 5
- b. Somewhat interested. - 3
- c. Not interested. - 5
- d. I require more information. - 12

**SURVEY RESULTS**

**PART II**

**RESPONDENTS**

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**SECTION I**

**BARNSTABLE COUNTY SERVICES**

**CAPE COD COMMISSION**

**1. RESET (Regional Economic Strategy Executive Team)**

**Please check this box if you are not familiar with this service: 9 checked**

**How well does this service meet the needs of your town?**

- Have used funds to redevelop areas in the past. Subsequent requests for funds have been unsuccessful.
- On Target when engaged
- Know it exists but not sure of recent activity
- This is an excellent service
- It works
- They are the best and do a great job
- Town needs of CCC very well met as staffing & funding allow
- We use service: traffic study/coordination of CWMP

**If this service is not being used in your town, why not? 0**

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**2. Wastewater Planning**

**Please check this box if you are not familiar with this service: 4 checked**

**How well does this service meet the needs of your town?**

- Could be better engaged
- Is a focus of town due to large expense
- Good - water protection collaborative monitoring
- Wastewater planning is an exceptional example of the creative thinking towns don't often have the time to undertake
- Well

- Provides good information
- WE need more
- They are good but towns could use more help
- Phenomenal group of knowledgeable professionals assisting the Cape in grappling with shared watersheds that have no formal shared jurisdictions.
- Extremely well met
- It is working well
- Well, coordination of CWMP
- From a regional perspective, but Chatham is well ahead of other communities.

**If this service is not being used in your town, why not?**

My experience as a Town Rep on the PB Alliance and the CCWP Collaborative showed me how politics can complicate these issues. Collaboratives with reps from each jurisdiction are the way to go to ensure mutual cooperation.

**3. Transportation Analysis / Planning**

**Please check this box if you are not familiar with this service. 5 checked**

**How well does this service meet the needs of your town?**

- Well
- Used in past for E. Harwich; not sure of any recent activity
- Very well - JTC & TIP development
- Great services
- Well
- It is not working for the youth
- This is the very best service the Commission offers
- Valuable to towns lacking traffic engineering expertise. Helpful for long-term capital planning and regional coordination of designs/solutions
- Met on as-needed basis, especially traffic counting, traffic planning, etc.
- It is working well
- We have done three traffic studies.
- Very well.

**If this service is not being used in your town, why not? No responses**

**4. Water Resources Analysis/Planning**

**Please check this box if you are not familiar with this service: 7 checked**

**How well does this service meet the needs of your town?**

- Excellent but should be expanded

- Very well
- Somewhat helpful
- Need more
- Working hard on a huge threat. Never enough money to ensure regional level protection efforts.
- Town has strong water resources staff internally so we use this service relatively infrequently, but invaluable for wastewater planning support.
- Our water department uses this
- Very well

**If this service is not being used in your town, why not?**

- Need more information about the offerings
- Protection and preservation opportunities are evaporating as development and density increase.

**5. Maps and GIS support/analysis**

**Please check this box if you are not familiar with this service: 3 checked**

**How well does this service meet the needs of your town?**

- Very well
- Not well - probably need to be trained on how to fully utilize. Would like summary data, e.g., amount of open space
- Somewhat
- This ability adds value
- Very little
- Meets needs/expectations
- Last time I asked for help with mapping & GIS I was told they were shorthanded and could not help me.
- We have our own very accomplished staff
- Well done and utilized frequently
- Valuable to towns with limited technical staff.
- Very well met. Always responsive when asked for assistance and meet reasonable deadlines for producing maps, etc.
- Our water department uses GIS
- We could use additional services

**If this service is not being used in your town, why not?**

- I don't know if this is available to us

**6. Technical Assistance on request.**

**Please check this box if you are not familiar with this service: 4 checked**

**How well does this service meet the needs of your town?**

- Good Response!
- Somewhat - the CCC has provided various technical assistance on request.
- Very important
- Used once and was satisfied
- Meets needs/expectations
- See above. Also GIS person was supposed to meet with me about online permitting but did not get back to me.
- Great teams and excellent service. Sometimes a bit too top down
- Always there when we need it!
- Meets. At times, technical assistance leads to studies, but no implementation. Generally, not CCC's fault, just economic realities of Cape Cod & our community. Would like more implementation and tangible fruits of the joint labor.
- Familiar, but could use more assistance with hazard mitigation
- Very but but in the hazard mitigation plan project

**If this service is not being used in your town, why not?**

- I don't know if this service is available to us

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**7. Development of Decision Support Tools**

**Please check this box if you are not familiar with this service: 8 checked**

**How well does this service meet the needs of your town?**

- Limited but could be expanded with personal TA
- Have initial decision tools for wastewater - needs to expand
- Well
- Excellent support & outreach during DRI project reviews.
- Very useful for housing

**If this service is not being used in your town, why not?**

- Not really sure if I know what this entails or if we are using it.

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**8. Administrator of Cost-Saving Regional Efforts (RWAN, ePermitting, Performance management)**

**Please check this box if you are not familiar with this service: 7 checked**

**How well does this service meet the needs of your town?**

- Fairly good
- Not very - did not rehire support staff
- Town does not fully utilize this - Commission services are the best offered by the county
- See above. After several phone discussions, the ePermitting person did not get back to me
- It does not
- We appreciate the efforts.
- Very important and timely. We're all trying to hold down costs so the more we can do regionally, the better.
- Accela is issue with loss of Dave Sullivan
- Needs improvement – services launched, but the uniqueness of each community is an added cost center and contract conclusion is not the same as project completion.

**If this service is not being used in your town, why not?**

- I may have missed this but should explore all efficiency opportunities
- Difficult to develop standardized tools and systems that address the varied needs

**DEPARTMENT OF HUMAN SERVICES**

***9. Free health insurance enrollment counseling for Medicare beneficiaries (SHINE). Shine collaborates with all 15 Senior Centers/COA's on Cape Cod.***

**Please check this box if you are not familiar with this service: 10 checked**

**How well does this service meet the needs of your town?**

- Very well
- Great program. Keep it going.
- Well, I think, but the need is growing
- Well, COA coordinates
- More effort is needed

**If this service is not being used in your town, why not?**

- I could probably use this service more. Perhaps I could get a refresher on what's available.

***10. Leadership of Cape-wide data collection and planning for senior citizens on Cape Cod***

**Please check this box if you are not familiar with this service: 10 checked**

**How well does this service meet the needs of your town?**

- Not sure we use this data in productive manner
- It could, we need to utilize it more
- Another rapidly growing need.
- Data comes in handy when submitting grant requests.
- Familiar, used to use for administration of Harwich Human Services grant
- More effort is needed

**If this service is not being used in your town, why not?**

We really need to coordinate better. It is odd how disparate service availability is across the Cape.

**11. Prevention and reduction of chronic diseases, such as diabetes, hypertension, and falls among seniors.**

**Please check this box if you are not familiar with this service: 9 checked**

**How well does this service meet the needs of your town?**

- Hopefully Health Dept. - Council on Aging utilizing information.
- Somewhat
- The seniors are well served by this and it could use to be expanded
- Not sure.
- Effort duplicates local outreach provided by Public Health Nurse's Office & Senior & Community Services Department.
- Somewhat familiar
- Coordinates with Health Department

**If this service is not being used in your town, why not?**

- Not sure
- Not sure it's provided

**12. Regional funding for supportive housing for chronically homeless households (McKinney Vento Continuum of Care).**

**Please check this box if you are not familiar with this service: 10 checked**

**How well does this service meet the needs of your town?**

- Well - participate in continuum of care
- Not used
- This is a huge challenge primarily because there are still people in our communities who do not understand how helping needy people helps them. I am sensing a strong resistance and resentment to aid programs

- Very important, but not as relevant for our community. Still a critical service to provide.

**If this service is not being used in your town, why not?**

- More information to the towns is necessary
- Perhaps the benefits of the programs are not apparent as progress and solutions are difficult to demonstrate.

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**13. Funding for affordable housing development and down payment closing cost assistance program (HOME Program).**

**Please check this box if you are not familiar with this service: 8 checked**

**How well does this service meet the needs of your town?**

- Very Good
- Actively participate in HOME consortium; have not received funds in some time
- Not sure programs are being used to their potential.
- Very important. Could always use more funding to support local/regional affordable housing initiatives. County efforts = better planned than c.40B submission of local developers. Working with local Housing Authorities is key.
- Not sure yet

**If this service is not being used in your town, why not?**

- Have organization involved - CPA, HAC, HECH but didn't know county could help
- I believe we do this through Eastham's CDP
- More resources are needed to leverage and greater buy-in and broader benefits

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**14. Prevention of substance abuse, working in conjunction with towns, elected officials, schools, healthcare, providers, and employers to develop regional strategies to secure funding resources (RSAC, MOAPC, SPC).**

**Please check this box if you are not familiar with this service: 6 checked**

**How well does this service meet the needs of your town?**

- There is opportunity for expanded service
- Very well - several town members participate in regional communities
- County efforts on substance abuse are important add on to Town services
- Still in introductory / needs identification stage in this town
- RSAC MOAPC SPC doe excellent work and should be better funded and additionally staffed
- Not sure.
- Meets. Coordination is needed with local effort so as to not duplicate and actually support joint initiatives.

- Useful
- Aware but not sure of utilization
- Not sure

**If this service is not being used in your town, why not?**

- Other methods are needed to accomplish intervention without destroying the community bonds and personal reputations and relationships. Resources and support are still major barriers to lifestyle changes.

**15. Direct consultation with non-profit organizations, healthcare & human providers, and town staff on Cape-specific data to support grant-writing activities.**

**Please check this box if you are not familiar with this service: 12 checked**

**How well does this service meet the needs of your town?**

- Not sure if we're using these services
- Limited knowledge of this, but know the County is there is a resource. County grant writer has been very helpful, even though we haven't been awarded much...at least we try.

**If this service is not being used in your town, why not?**

- We could very much use help seeking and submitting grant proposals.
- We probably need to make all departments know that consultation resources exist
- We need to reach out more on this
- Not sure if this has been utilized

**RESOURCE DEVELOPMENT OFFICE**

**16. Assistance with Grant program development.**

**Please check this box if you are not familiar with this service: 10 checked**

**How well does this service meet the needs of your town?**

- Has worked well in past
- Great work and expertise. We utilize whenever possible
- Not sure we use it to capacity
- Very helpful.
- Former town planner used

**If this service is not being used in your town, why not?**

- We need more education on this topic
  - Probably just too busy looking for grant opportunities elsewhere
  - We don't take advantage of this service, and we should
- 

**17. Grant writing services and /or technical assistance**

**Please check this box if you are not familiar with this service: 10 checked**

**How well does this service meet the needs of your town?**

- Has worked well in past
- Very helpful
- Again, great professionals who need more staffing
- Not sure.
- Very helpful. See answer to Question 15 above.
- Former town planner used

**If this service is not being used in your town, why not?**

- Our staff is pretty good at this, maybe a little too confident (?)
- 

**18. Grant oversight and fiscal management.**

**Please check this box if you are not familiar with this service: 11 checked**

**How well does this service meet the needs of your town?**

- Helpful
- This sounds really useful.
- For County & regional grants, this oversight is helpful. Most grants = local so finances overseen by town Accounting Office.
- Former town planner used

**If this service is not being used in your town, why not?**

- We are ok in house with this function
  - Not sure we would think of contacting or involving the County if it weren't a Co or regional grant
  - Need more education on this topic
-

**19. Grant Webinars/Workshops**

**Please check this box if you are not familiar with this service: 13 checked**

**How well does this service meet the needs of your town?**

- Very helpful
- We only use this when we know of a grant or are already planning to apply

**If this service is not being used in your town, why not?**

- Same comment as above
- Time and staffing limit the participation of the town staff
- Probably an opportunity for outreach and explanation
- Time and staffing limit the participation of the town staff
- Need better coordination

**This concludes Part II of the survey.**

## SURVEY RESULTS

### PART III

#### RESPONDENTS

TOWN ADMINISTRATOR	5
SELECTMAN	2
OTHER TOWN ELECTED/APPOINTED OFFICIAL	7

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#### SECTION 1

#### BARNSTABLE COUNTY SERVICES

#### DEPARTMENT OF HEALTH AND ENVIRONMENT

- 1. Local Board of Health Services: Services to the communities in Barnstable County Include: Health Agent coverage, restaurant inspections, swimming pool inspection, septic plan review (particularly advanced treatment systems), soil tests, housing inspections, sanitary code and compliance investigations. Some communities have opted for contractual opportunities for these services for extended periods of time during time of extended health agent leaves (maternity or illness).*

Please check this box if you are not familiar with this service: 4 checked

How well does this service meet the needs of your town?

- Big help
- Very well - we utilize seasonal inspectors
- Our own health department does this
- Well for tick testing and informational presentations, water testing, etc.
- Meets needs when required
- Town has used
- The Towns are very well served but more staffing would be desirable
- Not sure, but probably well used due to our staff's knowledge and Cape-wide connections
- Excellent service. Always there when needed. A huge plus for smaller towns. Very responsive when called.
- We utilize, periods of vacancies

If this service is not being used in your town, why not?

- Health Dept. handles it. It would be very productive to open discussions to determine if County can handle more efficiently.
- Connections can always be strengthened.
- Not needed – have 1.5 FTE

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**2. *Community Septic Management Loan Program (CSMLP): CSMLP has worked on behalf of homeowners in the 15 communities on Cape Cod to upgrade failed residential septic systems by providing an affordable long-term loan program.***

**Please check this box if you are not familiar with this service: 3 checked**

**How well does this service meet the needs of your town?**

- Runs very smoothly.
- Not sure how many people take advantage of loan program due to low bank interest rates. Need to evaluate rates to offer true help. Also expand to help those connecting to sewer system.
- Very well - program is an integral part of septic management.
- It is helpful.
- Kendall has served our town very well with this program.
- Excellent.
- I believe folks know about these services and are using them.
- Excellent service provided. Saves local administrative oversight and advice given is spot on.
- Works very well.
- Useful.
- Will be using/advertising more

**If this service is not being used in your town, why not?**

- Sewering may be seen as too comprehensive a solution, even though it won't solve everything.
- Interest rate too high

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**3. *Massachusetts Alternative Septic System Test Center (MASSTC) and Title 5 Services: MASSTC has been operated to provide the communities in Barnstable County with state-of-the-art information on onsite septic systems that are being considered to address the Cape's problems with nitrogen that impacts out drinking water and marine water. All administrative and performance tracking of the installed alternative systems in each community is accomplished by a nationally lauded and self-sustaining program at no cost to the towns.***

**Please check this box if you are not familiar with this service: 8 checked**

**How well does this service meet the needs of your town?**

- Needs quicker approval of nitrogen removing systems.
- Great service as we move forward with 208.
- Very well - testing new wastewater technologies.
- It helps indirectly.
- Well done, but more outreach would be helpful.
- Great program - still needs publicity and solutions need support for proliferation.

- Aware of this but waiting to see preliminary results. If unique solution can be found, it will help the vast majority of Cape towns that don't have sewer systems. A long-term, home-based Title V solution would save Cape hundreds of millions of dollars.
- Coordinated with health department

**If this service is not being used in your town, why not?**

- Lack of awareness

**4. *Public Health Nursing and Public Immunization Program: This program provides the fifteen communities with a vital public immunization program, sun safety education, tick borne diseases education, blood borne pathogens testing, tuberculosis testing and bladder cancer screening (particularly for high risk individuals among the public safety), public health outreach at food pantry's, blood pressure clinics, preventative health screenings and support at municipal health fairs.***

**Please check this box if you are not familiar with this service: 3 checked**

**How well does this service meet the needs of your town?**

- I'm aware of some of these services - not all.
- Very well - have utilized staff for various seminars and clinics.
- Meets needs/expectations.
- Tick born class was great, we do our own sun safety program that is used state-wide now.
- More and better. Great service that the Town takes advantage of
- Not sure.
- Assists local efforts of Public Health Nurse's Office. Our town probably doesn't use this service as much as other communities without local nursing department.
- This program is excellent.
- Coordinated with Health Department
- Very well

**If this service is not being used in your town, why not?**

- I suspect a majority of our residents get these services through their regular health care providers

**5. *Bathing Beach Water Quality Program: This program provides the communities with the collection and bacterial analysis of every town beach in Barnstable County. Additional Services include: Notification to town health agents when bacteria levels are exceeded and Immediately resampling and analysis of affected beaches to reduce closure periods. Over 350 beaches are monitored and reported weekly.***

**Check this box if you are not familiar with this service: 4 checked**

**How well does this service meet the needs of your town?**

- Needs quicker retest response time and education about findings if not human fecal
- Utilize services
- Very well - utilize program every year
- This is very helpful, however it would be more helpful if the testing did not result in a closure on a Saturday.
- Meets needs/expectations.
- We use this and are happy with the public bathing beaches being tested.
- Super. We could not do without this service
- Absolutely essential! Don't know what we'd do without it.
- Invaluable service for our fresh & saltwater beaches. Use it all the time.
- Coordinated with Health Department
- Not sure if this has been used on a regular basis, possibly as a back up.

**If this service is not being used in your town, why not?**

- Needs will only expand.

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**6. *Barnstable County Water Quality Laboratory: The Laboratory assists water districts, municipalities and homeowners with high quality analysis of various contaminants in accordance with state and federal water quality standards. The laboratory also assists with monitoring of fresh and marine waters, required monitoring near closed landfill, shellfish harvesting areas and other areas of environmental concern. Special projects such as the lead-in-school water supplies are accomplished by maintaining state-of-the art analytical capabilities.***

**Please check this box if you are not familiar with this service: 4 checked**

**How well does this service meet the needs of your town?**

- Very Well
- Well
- Good - Could do more wastewater and CEC testing
- Very well! The marine and coastal services have been very helpful for public education, getting shellfish seed and general overall assistance for shellfish related topics. This is a vital component of the Cape's economy.
- Meets needs/expectations
- I know we use it, but can't speak to what extent
- this service is well used by many in our community. Excellent service
- Also essential. And seems to have support enough to be very responsive
- Great service. Assists local water district (separate from town government) and used periodically by our local health department.
- Coordinated health/water department
- Not sure

**If this service is not being used in your town, why not?**

- Can't imagine it not being used by everyone...

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**7. *Environmental Health and Safety Program: The EHS Division serves the towns in the capacity of assessing, assisting, developing, administering, reviewing, and implementing necessary and current environmental, health, and safety compliance needs. Currently, the focus has been on lowering municipal employee risks and hazards by preventing job-related accidents, injuries, and illnesses and reducing the overall risk to towns, resulting in lowering liabilities for health***

**Please check this box if you are not familiar with this service: 9 checked**

**How well does this service meet the needs of your town?**

- Well - excellent yearly training.
- Have taken some training at the county level, but since the Town has brought on a Safety Officer it has brought a lot to each dept.
- We need more help and the department at the County needs more staffing.
- Not sure.
- Helps when requested. Not used regularly, but very responsive when called for advice & input.
- Coordinates with Assessor's/Health

**If this service is not being used in your town, why not?**

- I would like this program to be much more visible with training and management tools to ensure employees are following safety procedures. Failure directly affects town expenses.
- When I worked for a Town that used MIIA for Workers Comp and EAP, those entities provided a great deal of support in these areas. Non-MIIA towns could really use the County's help!

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**8. *Cape Cod Regional Tobacco Control Program: This program, funded by the Massachusetts Department of Public Health supports the fifteen local Board of Health with compliance with state and local tobacco regulations. The focus of the program is limiting of youth access and implementation of comprehensive tobacco education program.***

**Please check this box if you are not familiar with this service: 9 checked**

**How well does this service meet the needs of your town?**

- Good - funding cuts over years has resulted in less contact
- Still needs work.
- Board of Health speaks highly of this program.
- Well.
- Coordinates with Health Department
- Very well

**If this service is not being used in your town, why not? No responses**

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**9. *Membership Participation in Regional Forums: Often the interest of the towns is not represented in state and regional bodies that have influence at the state level. The Department serves on state panels to make the needs of the towns known. These include the State Emergency Response Commission, the Title 5 Review Stakeholder Group, The Massachusetts Public Health Nursing Association, New England Interstate Onsite Wastewater Group, State Onsite Regulator Association, The Barnstable County Lyme Disease Task Force, and the State Hoarding Task Force.***

**Please check this box if you are not familiar with this service: 9 checked**

**How well does this service meet the needs of your town?**

- Well
- OK. But the County should ask the Towns before testifying
- Always a need to keep our ears perked as issues and alternative solutions emerge
- Helpful, with information & assistance distributed directly to relevant local departments. Not used so much by central administration.
- Health Department participates in some

**If this service is not being used in your town, why not?**

- I may have missed his but would be could to communicate issues to towns to obtain feedback before working on state issues

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## **BARNSTABLE COUNTY REGIONAL PREPAREDNESS DIVISION**

**10. *The Barnstable County Regional Emergency Planning Committee supports the emergency management and public safety agencies in the fifteen communities with comprehensive all hazard emergency planning and response. The REPC provides a monthly forum to address critical public safety issues in the county, and operates the Multi-Agency Coordination Center (MACC) during regional emergency events where power restoration, sheltering and recovery resources may be needed.***

**Please check this box if you are not familiar with this service: 5 checked**

**How well does this service meet the needs of your town?**

- Very well - provide staffing to fulfill state mandates
- it's helpful
- Not sure how effective in Barnstable this is
- Very well.
- Outstanding service and very unique compared to other regions of MA & New England. Exceptional cooperation & assistance. A must for our County based on storm events, unique nature of Cape population, etc. Superior cooperation by all. A national model.
- Works very well

- Emergency management
- Very well

If this service is not being used in your town, why not? No responses

---

**11. Tier II Hazardous Chemical Emergency Report Inventory Program: This program assists the communities with compliance to the Emergency Planning and Community Right to Know Act. Services to the towns include the assistance to municipal agencies with the submission Tier II hazardous materials inventory reports for over 450 facilities, the provision of hazardous materials inventories and facility emergency response plans to fire departments and a comprehensive hazardous materials education program.**

Please check this box if you are not familiar with this service: 5 checked

How well does this service meet the needs of your town?

- Need program to remove AFFF from locals and guidance for post-deployment clean-up of foam
- Well - very supportive in report development
- I have not heard otherwise about the program.
- Have taken the classes for this
- Not sure, but I think we are well served.
- Great service when needed. Thankfully, we haven't need it much, but it's comforting to know this type of emergency response & assistance exists.
- Excellent program
- Emergency management

If this service is not being used in your town, why not? No responses

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**12. Barnstable County Regional Sheltering Program: The regional sheltering program supports six regional emergency shelters and two satellite shelters that provide Cape communities safe locations to serve each community should residents or visitors need to be evacuated due to an emergency event, such as a tropical storm or severe winter weather event. The program coordinates volunteers, grant requests for equipment, public awareness efforts and develops of regional exercises to review capabilities.**

Please check this box if you are not familiar with this service: 4 checked

How well does this service meet the needs of your town?

- Good
- Very well
- Meets needs/expectations
- Know that the middle school has been used and the community is well informed.
- Fair. Always a need to beef up our coordination and info sharing.

- Exceptional service. Our town is one of 6 regional shelter communities & even though this designation means more work locally for town staff, it's eminently worth it. Need to focus more on grant-funded capital improvements for regional shelters.
- Works well
- Emergency management
- Has worked well, but with late notice about shelter openings. Also needs a transportation component

**If this service is not being used in your town, why not?**

- I'm generally aware but would like better communication regarding issues.
- A false sense of security?

**13. Cape and Islands Health Agents Coalition/Public Health Emergency Planning:** *This program assists the local health departments with public health emergency planning for communicable diseases such as influenza, SARS, Anthrax and many other hazards. This is done through the development of communicable disease response plans, continuation of operation planning, coordination of local and regional exercises and the continued operation of a regional Medical Reserve Corps to support these and other emergency response efforts.*

Please check this box if you are not familiar with this service: 6 checked

**How well does this service meet the needs of your town?**

- Very well
- Very helpful!
- Meets needs/expectations
- Not sure.
- Great service used by local health department, not so much by Town Manager's Office.
- Health department utilizes services.
- Very well

**If this service is not being used in your town, why not?**

- Still some sense that we are somewhat immune

**14. The Barnstable County Fire and Rescue Training Academy (BCFRTA):** *BCFRTA is a vital regional training facility for fire departments in Barnstable County. BCFRTA provides fire departments comprehensive training in fire response, Emergency Medical Services (EMS), technical rescue, and incident management. Additionally, the academy offers a Fit Testing Program to departments for their breathing apparatus, a shipboard firefighting program for the cadets at the Massachusetts Maritime Academy and Industrial Fire Brigade training.*

**Please check this box if you are not familiar with this service: 4 checked**

**How well does this service meet the needs of your town?**

- A hazardous waste site that should be cleaned up!
- Very well
- Meets needs/expectations
- Our 5 fire departments are awesome and they are well trained.
- Excellent cross training
- Excellent facility, needs more funding
- Fire Department utilizes services
- Has some merit, but I question how much it actually saves the towns. Regional hiring lists perplex me and I question how they are derived through the County Fire Chief Association. Not sure we get the best, qualified applicant's through current process.

**If this service is not being used in your town, why not? No responses.**

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## **CAPE COD COOPERATIVE EXTENSION**

### **15. Shellfish & Aquaculture Services**

- *Regional shellfish bid and financial assistance (currently \$30,000) for towns to acquire oyster and quahog seed at lowest price with reliable delivery.*
- *Shellfish Constable services – technical assistance during shellfish closures, shellfish habitat assessment, disease testing and analysis of municipal shellfish stock, host and facilitate Barnstable County Shellfish Advisory Committee, teach many of the Shellfish Constable Certification courses.*
- *Water quality monitoring to address nitrogen and nutrient issues and the role shellfish can play in remediation.*
- *Provide towns with safe shellfish harvest and handling training and literature.*
- *Extensive outreach and education to private aquaculturists including Fundamentals of Shellfish Farming eight-week course.*

**Please check this box if you are not familiar with this service: 3 checked**

**How well does this service meet the needs of your town?**

- Very well.
- Very useful.
- Fair.
- Quite helpful.
- Very helpful.
- This is a vital program. The propagation funding has been utilized fully to purchase quahog seed to grow out for recreational shell fishing. The presentation by staff for local residents and commercial shell fishermen have been great! And the signage too!

- Meets needs/expectations.
- I do not shellfish, but our town seems up on everything to serve the community.
- Still a need to integrate fishers and farmers and food service industries.
- A huge help in our town. Shellfish beds were closed for 40+ years and recently opened in last decade thanks to joint efforts with this group. Federal drainage grants also very attractive & helpful.
- Natural Resources utilizes these services
- Very well

**If this service is not being used in your town, why not?**

- Fishers tend to think they are self-sufficient, more knowledgeable than they are, and that all intervention is negative.

**16. Coastal Erosion and Flood Management**

- *Community Rating System (CRS) Coordinator responsible for helping towns qualify and reach maximum savings for their residents who pay flood insurance on their homes.*
- *Shoreline mapping, technical reports to conservation commissions on erosion, beach nourishment, and impacts of proposed building sites.*
- *Provide detailed technical bulletins to municipal staff on coastal issues (storm damage, plantings, beach management).*
- *Barnstable County Municipal Conservation Agent working group – provide monthly meetings, trainings, and technical assistance to town conservation agents.*

**Please check this box if you are not familiar with this service: 3 checked**

**How well does this service meet the needs of your town?**

- Very well
- Helped but not sure if extension had any influence on regulations.
- Very well
- Quite helpful
- Very helpful
- This program is also hugely helpful, especially having an independent review from Greg Berman of coastal projects. This has greatly helped the decision-making of the conservation commission.
- Not sure
- Just getting started - Lots more to do
- Town is working on this, but still has a way to go. Great service to provide that we couldn't locally. Residents still don't understand how much this will save them in future for flood insurance, etc. Need to publicize more once CRS approved.
- Town planner and Conservation agent utilizes services
- We participated in this certification

**If this service is not being used in your town, why not?**

- Disagreement over degrees of threat, need and solutions
- 

**17. Entomology / Tick borne Disease Research, Education and Prevention**

- *Barnstable County Lyme Disease Task Force – community outreach, Physician and Nurses Forums, collaboration and communication with community and state resources.*
- *Tick borne disease prevention through community education.*
- *Tick testing, tick research, collaboration with EPA and UMASS.*
- *Insect / pest management services – gypsy moth, winter moth, assistance to local farmers.*

**Please check this box if you are not familiar with this services: 3 checked**

**How well does this service meet the needs of your town?**

- Vital!
- Somewhat
- Quite helpful
- Helpful
- The education has been great - both for staff and for residents. I think this program has probably resulted in preventing numerous cases of tick diseases.
- I have attended classes and know that the services are well needed and well used.
- Effective when folks are aware
- Very helpful for local health departments. Great resource.
- Health Department utilizes this service
- Not sure

**If this service is not being used in your town, why not?**

- More mainstreaming of the issues is needed. People are either overly fearful or completely ignorant of the threat of "pests".
- 

**18. Horticulture / Master Gardeners / Buy Fresh Buy Local Cape Cod.**

- *Technical assistance to tree wardens, conservation agents, natural resource departments on land and wildfire management, forestry, and municipal plantings.*
- *Fertilizer Certification for applicators as require by town bylaw.*
- *Horticulture clinic, direct service to citizens on plants and gardens.*
- *Green industry support – landscapers, arborists, nurseries.*
- *Buy Fresh Buy Local Cape Cod – connecting community members with locally grown and harvested products; providing marketing and technical assistance to farmers*

- *Technical assistance and economic development for local farmers.*
- *Barnstable County Municipal Shade Tree Nursery – grow and provide regionally appropriate trees and shrubs at low cost to municipalities.*

**Please check this box if you are not familiar with this service: 6 checked**

**How well does this service meet the needs of your town?**

- A good service
- Somewhat
- very little
- Meets needs/expectations
- Not sure to what extent the town uses this
- Not sure.
- Helpful, but not used extensively here.

**If this service is not being used in your town, why not?**

- The shade trees and shrubs would be a great benefit! Especially if native to Cape Cod. I am interested in learning more about this!
- Agriculture seems benign. Most people like fresh produce and don't see how "support" multiplies "yields"

**19. Nutrition and Food Safety**

- *Collaborate with Health Agents on food safety classes for food establishments.*
- *Senior citizen nutrition programs, school nutrition, ServSafe, business assistance to keep in compliance with local, state, and Federal laws.*
- *Food Pantry and Cape Cod Hunger Network program facilitation and safety compliance education.*
- *Supplemental Nutrition Assistance Program Education - Preschool nutrition education, parent education, community services.*
- *Small business assistance guidance and education for mandatory food safety plans.*

**Please check this box if you are not familiar with this services: 5 checked**

**How well does this service meet the needs of your town?**

- Good
- Thanks for helping out
- Well
- Meets needs/expectations
- We have taken advantage gaining Food Safe certifications.

- Much greater need across the Cape than is apparent
- Helpful, but used extensively here.
- Health Department utilizes services
- New food pantry program works well

**If this service is not being used in your town, why not?**

- Stigma, lack of awareness, misconception, lack of access.

**20. Youth Programs & Youth Development**

- *4-H Youth Development Program for ages 5 -18. Part of national 4-H program reaching over 5,000 Cape Cod youth (and 200 adult volunteers) yearly through clubs, after school programs, special events, in school enrichment, and camps.*
- *4-H Life Skills - Leadership, Communication, Community Service and Citizenship under the guidance of trained, screened volunteers.*
- *Military Family Programs: Week-long, grant-funded family-centered camps for military families on Cape Cod.*
- *After School and At-Risk Youth Programs – cooperative work with school systems to provide programs for youth that otherwise could not access or afford services.*
- *Coastal Explorer – mobile classroom on wheels delivering locally based marine curriculum to schools in accordance with state and federal testing requirements.*
- *WET Festivals – one-day education sessions focused on water quality education delivered to 4th-6th grade students covering Cape Cod water protection and conservation.*

**Please check this box if you are not familiar with this services: 7 checked**

**How well does this service meet the needs of your town?**

- Good
- Not sure any of this filtrates to Harwich
- Meets needs/expectations
- Work closely with 4-H, Military Family Programs and Grand Parents raising grandchildren.
- Excellent outreach.
- Helpful, but not used extensively here.
- N/A

**If this service is not being used in your town, why not?**

- Local educators doing a darn good job, too.

**Please check this box if you are not familiar with this service.**

**6**

**21. Municipal Solid Waste (Trash) and Recycling**

- *Municipal Assistance Coordinator (MAC) provides technical assistance and acts as conduit for communications with MassDEP for transfer station and landfill needs including trash management options and municipal recycling resources.*
- *Grant assistance for municipal trash, recycling and large-scale composting.*
- *Information services to solid waste advisory committees, town finance committees, elected officials and staff.*

**Please check this box if you are not familiar with this service: 7 checked**

**How well does this service meet the needs of your town?**

- Very well
- Not very relevant
- Not sure
- The Cape has already lost a lot of opportunities to regionalize and market re-usable materials.
- Very helpful & informative. Regional household hazardous waste collection events are critically important & well used.
- DPW has utilized this services
- Works well

**If this service is not being used in your town, why not?**

- Lack of interest. People just want to minimize costs and get rid of it. Marketing and re-use require investment.

**22. Household Hazardous Waste programs (Groundwater Protection)**

- *Coordination of all municipal household hazardous waste collections.*
- *Direct services to towns and citizens in need of hazardous waste disposal options.*
- *Sharps (needle) collection program for each town.*
- *Road and marine flare collection program.*
- *Mercury containing device collection program.*
- *Unwanted medication collection program.*

**Please check this box if you are not familiar with this service: 4 checked**

**How well does this service meet the needs of your town?**

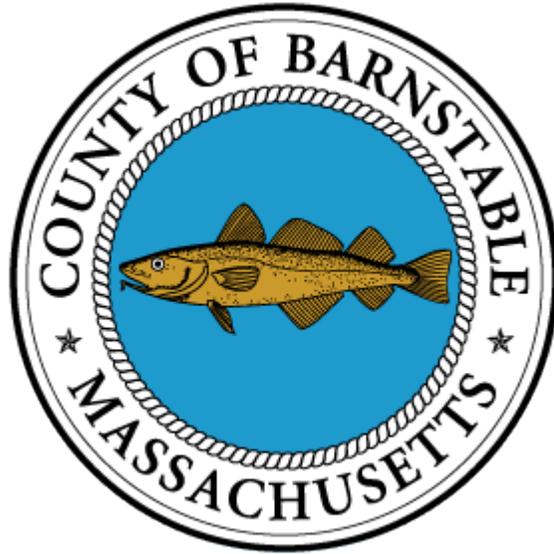
- Excellent
- Very well
- Hazardous waste program is useful
- HHW Day is a great program! It has undoubtedly helped to properly dispose of untold amounts of toxic chemicals.
- Collection of Haz Mat needs to be even easier and "anonymous". Never enough drop off opportunities.

- See answer to Question 21 above.
- Great program
- DPW utilizes this service
- Works well

**If this service is not being used in your town, why not?**

- Maybe a need for more encouragement and free pick-ups

**This concludes Part III of the survey.**



# On Roads to Opportunity

## Internship Policies and Procedures Manual

**Barnstable County Guide for Hosting Interns in Partnership with  
Bridgewater State University**

**RESOURCE DEVELOPMENT OFFICE**

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**Attachments:**

1. Student Internship Development Worksheet
2. Student Intern Appointment Letter Template
3. Exit Survey for Student Interns – Sample

## ON ROADS TO OPPORTUNITY INTERNSHIP

### A. PURPOSE

Barnstable County established a partnership with Bridgewater State University in order to provide a mutually beneficial system for growth and learning opportunities to students in college and post-college. This document provides the policy and processes specific to hosting interns from BSU.

Student interns are involved in education or training programs designed to provide them with professional experience in the furtherance of their education and training and are academically oriented for their benefit. Internships assist students in reaching their educational goals by giving them the opportunity to augment classroom instruction with exposure to a real-world employment setting.

### B. ESTABLISHING AN INTERNSHIP FOR STUDENTS

An internship is a planned program to provide a student with a meaningful learning experience applicable to the student's field of study during the course of a fall, spring or summer semester. This requires structured assignments coupled with appropriate supervision, evaluation, and feedback. Learning objectives will be developed with the University when considering a student internship opportunity. It is beneficial to have clear job duties that identify the learning objectives or a defined project scope that demonstrates how the learning objectives for each individual will be met.

The procedure for establishing a student internship is as follows:

- 1. Define the Work Program.** Prior to requesting a position for the intern, a department of Barnstable County should define a mutually beneficial project for the intern designed to provide meaningful experience generally applicable to a field of study offered at Bridgewater State University. The Internship Questionnaire can assist in defining the job description.
- 2. Resource Development Office Approval of Request.** After submission of the position request to the Resource Development Officer, RDO will review the position request. RDO may contact the department for additional information, if necessary. If approved, the request is routed to Bridgewater State University for review.

3. **Bridgewater State University Request.** BSU reviews the request for approval/denial. BSU may contact the department for additional information, if necessary.
4. Upon receipt of approval notification, BSU will post the internship and recruit candidates that meet the qualifications of the internship. Deadlines to apply will be established through Barnstable County Human Resource Department.
5. **Identify the Candidate.** Candidates will be selected for an interview. An RDO Officer and the person from the department that initiated the request for an intern will be present at the interviews.
6. **Complete the Onboarding.** In Collaboration with Barnstable County Human Resource Department a candidate is identified, hours worked verified and start date agreed upon.

#### **C. BARNSTABLE COUNTY'S RESPONSIBILITIES UPON ACCEPTANCE – STUDENT INTERN**

1. **Send Appointment Letter to Intern, copying BSU. Resource Development Office** provides the intern an appointment letter.
2. **Assign Intern to Orientation.** All interns must attend a general county orientation for all new interns at the beginning of the semester. Appointed department supervisors should provide a tour and introductions in their department after orientation. The Department Supervisor will develop a professional relationship with the student as an intern and not as an employee.
3. **Review Responsibilities with Supervisor**  
Meet with Intern Supervisor to go over responsibilities and provide him or her with supporting materials to encourage a successful intern placement. At this time, establish a schedule for checking in with the Resource Development Officer at the beginning, middle, and end of the semester.
4. **Complete General On-Boarding.** Complete any additional paperwork and processes associated with on-boarding an intern.

#### **D. COMPENSATION**

Student intern compensation is determined and provided by Bridgewater State University.

#### **E. EARNING ACADEMIC CREDIT**

Bridgewater State University, the student and the student's professor shall determine the number of academic credits earned from their internship at Barnstable County.

#### **F. STUDENT INTERN POSITION MONITORING**

Barnstable County Resource Development Office must regularly review the duties performed by student interns to ensure that they are engaged in meeting their learning objectives. An RDO Officer should schedule a meeting with the intern supervisor and the intern, at the beginning, middle, and end of the semester.

## **G. TERMINATION**

Student interns are at will employees and the employment relationship may be terminated by either party at any time without cause or prior notice. Upon termination of the internship, Barnstable County is encouraged to work with the student intern to determine whether the objectives of Barnstable County's On Roads to Opportunity Internship Program are being met. To facilitate that determination, a sample exit interview form for student interns follows in the Reference Documents section below.

## **H. COMPLETION OF INTERNSHIP**

Upon successful completion of the internship, a student will receive a Certificate of Participation, signed by the County Commissioners.

## **I. REFERENCE DOCUMENTS**

1. Student Intern Appointment Letter Template
2. Student Internship Position Questionnaire
3. Exit Survey for Student Intern – Sample
4. Participation in Barnstable County's On Roads to Opportunity Internship Program Certificate – Sample



## Sample Student Intern Appointment Letter Template



DATE

NAME

ADDRESS

ADDRESS

Dear NAME:

Welcome to Barnstable County. The purpose of this letter is to confirm your appointment to the position of Student Intern in the department of \_\_\_\_\_ at Barnstable County. The effective date of your hire is DATE.

This position reports to supervisor, title. Your primary work location will be in the \_\_\_\_\_ located at address.

This position's standard workweek is \_\_\_\_\_ hours and normal work hours are 8:30 am to 4:30 pm, Monday through Friday. You may discuss your specific schedule with your supervisor.

In this position you will summary of duties. Specific job duties will be discussed with you upon commencement of your internship.

You are required to comply with federal government work authorization requirements. Within the first three days of employment you must present document(s) that identify both your identity and ability to work in the United States. On your first day of work, you will meet with a Human Resources staff person who will provide more information.

You are scheduled to attend a New Employee Orientation at time on date, at \_\_\_\_\_ of the Resource Development Office, at \_\_\_\_\_. Your supervisor will arrange additional training for you including the mandatory web-based Ethics test.

Student internships are programs that provide students with exposure to workplace activities which are related to the intern's field of study. As a student intern, you are an at-will temporary employee and serve at the pleasure of the hiring authority; either you or the county may terminate your employment at any time with or without cause or prior notice.

The following items are important for you to know:

- You are ineligible for Barnstable County benefits.
- You may be separated from employment prior to the completion of the assignment without cause or prior notice.
- You do not attain any rights toward career service or regular employment.

- You are not represented by a labor union.
- To be eligible for hire into a career service position you must first compete in a formal selection process.

To qualify as a Student Intern, the following criteria must be met:

- You must be enrolled as a student at Bridgewater State University and participate in its internship/community service protocols.
- You must have a cumulative GPA of at least a 2.5 to be eligible for college credit and a cumulative GPA of at least 2.75 or higher to receive a stipend from Bridgewater State University.

If you have any questions about your position or any information in this letter, please contact name, title, at phone.

Congratulations on your appointment, and again, welcome to Barnstable County.

Sincerely,

Attachment

cc: SUPERVISOR



Exit Survey for Student Interns

We hope you enjoyed your learning experience with Barnstable County. So that we may learn from your experiences with us, we would appreciate your completing this exit survey. Survey responses provide valuable information the county can use for improving the learning experience of student interns.

**Name:** \_\_\_\_\_ **Supervisor/Mentor:** \_\_\_\_\_

**Department/Division:** \_\_\_\_\_ **Area of Study/Major:** \_\_\_\_\_

**Dates of Internship:** \_\_\_\_\_

**School Level (circle one):** Undergraduate, Graduate, Post-graduate

Were the following reasons important in your decision to intern with Barnstable County	Yes	Somewhat	No
Desire to work in the public/government sector after graduation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Barnstable County's reputation as a good learning environment for interns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
School credit or meeting an educational requirement from your internship	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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**Please describe your internship experience at Barnstable County including projects on which you participated and a description of typical daily activities performed**

<b>Please tell us about your experience at Barnstable County</b>	<b>Strongly agree</b>	<b>Agree</b>	<b>Disagree</b>	<b>Strongly disagree</b>
I was able to develop skills related to my area of educational study	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I understood the learning objectives of my internship	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I received feedback on progress toward meeting my learning objectives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Please describe how this internship complimented your educational learning objectives**

<b>Please tell us about your experiences with your supervisor/mentor</b>	<b>Strongly agree</b>	<b>Agree</b>	<b>Disagree</b>	<b>Strongly disagree</b>

My supervisor/mentor was accessible and approachable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My supervisor/mentor exhibited genuine interest in my development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My supervisor/mentor provided learning opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

---

**Thank you for completing the survey. Your responses are valued and appreciated.**

**Please send completed surveys to:      Barnstable County Resource Development Office**

**(Rough-draft) Proposed "Statement of Ethics" of the Barnstable County Commissioners [based upon the template approved by the Massachusetts Municipal Association, MMA], Presented by County Commissioner Ron Beaty**

**BARNSTABLE COUNTY BOARD OF REGIONAL COMMISSIONERS**

1. A member of the Barnstable County Board of Regional Commissioners, in relation to his or her community should:

- Realize that his or her basic function is to make policy, with administration delegated to the County Administrator.
- Realize that he or she is one of a team and should abide by, and carry out, all Board decisions once they are made.
- Be well informed concerning the duties of a Board member on both county and state levels.
- Remember that he or she represents the entire community at all times.
- Accept the role of a member is a means of unselfish service, not to benefit personally or politically from his or her Board activities.
- Abide by the ethics guidelines established by the State and not use the position of County Commissioner to obtain inside information on matters that may benefit someone personally.

2. A member of the Barnstable County Board of Board of Regional Commissioners, in his or her relations with the County Administrator, should:

- Endeavor to establish sound, clearly defined policies that will direct and support the administration of or the benefit of the staff and residents of the community.
- Recognize and support the administrative chain of command and refuse to act on complaints as an individual outside the administration.
- Give the County Administrator full responsibility for discharging his or her disposition and/or solutions.
- Not give instructions to or request assistance from County department heads, but rather channel all such activities through the full Board and the County Administrator.

3. A member of the Barnstable County Board of Regional Commissioners, in his or her relations with fellow Board members, should:

- Recognize that action at official legal meetings is binding and that he or she alone cannot bind the Board outside of such meetings.

- Not make statements or promises of how he or she will vote on matters that will come before the Board until he or she has had an opportunity to hear the pros and cons of the issue during a Board meeting.
- Uphold the intent of executive session and respect the privileged communication that exists in executive session.
- Make decisions only after all facts on a question have been presented and discussed.
- Refrain from communicating the position of the Board of Regional Commissioners to anyone unless the full Board has previously agreed on both the position and the language of the statement conveying the position.
- Treat with respect the rights of all members of the Board despite differences of opinion.

4. A member of the Board of Regional Commissioners, in his or her relations with County staff, should:

- Treat all staff as professionals that respects the abilities, experience, and dignity of each individual.
- Limit contact to specific County staff. Questions of County staff and/or requests for additional background information should be directed only to the County Administrator, County Counsel, or Department heads. The office of the County Administrator should be copied on all requests or correspondence.
- Never publicly criticize an individual employee. Concerns about staff performance should only be made to the County Administrator through private conversation.
- Limit requests for staff support, and insure that all requests go through the County Administrator's office.
- Insure than any materials or information provided to a County Commissioner from a staff member be made available to all County Commissioners.

**BARNSTABLE COUNTY WRITTEN PROCEDURE FOR DISPOSAL OF SURPLUS SUPPLIES WITH A VALUE OF LESS THAN \$10,000.**

***Surplus Items with an estimated value of over \$10,000. 00***

All tangible supplies with an estimated value of over \$10,000.00, must be disposed of according to Chapter 30B, section 15. These rules apply to all tangible surplus supplies with retail or salvage value, including motor vehicles, machinery, computer equipment, furniture and other materials and supplies. This does not include real property.

***Surplus Items with an estimated value of less than \$10,000.00***

Pursuant to M.G.L. c. 30B, 15(F), the County's Chief Procurement Officer is required to dispose of tangible supplies that are no longer useful to the County but have an estimated net resale or salvage value of less than \$10,000 using written procedures approved by the County Commissioners. This policy applies to all tangible surplus supplies with retail or salvage value, including motor vehicles, machinery, computer equipment, furniture and other materials and supplies. This does not include real property.

*All IT equipment, including computers, phones, printers, and mobile devices that have been purchased using County funds and are no longer of use must be returned or turned over to the IT Department to determine its condition and dispose of as efficiently and cost effectively as possible.*

***For all other items:***

The Department will forward a list of the item(s) to the Chief Procurement Officer, which includes the following information:

- Description of the item(s), along with model numbers, serial numbers or any other identifying markings
- Condition
- Picture
- Reason why the item(s) are no longer needed
- Estimated value

The Chief Procurement Officer will distribute the list to other Departments to determine if the item(s) can be utilized elsewhere in the County.

If another department wishes to take the items(s), both departments are to make arrangements for transfer of the items.

If no other department responds within 5 days, the Department owning the item(s) will send a request to the County Administrator to have the item(s) declared surplus.

Once the item(s) have been declared surplus, the surplus declaration signed by the County

Administrator is to be forwarded to the Chief Procurement Officer.

The items will either be sold at auction, stored, offered to another governmental agency or disposed of.

***Surplus Items with an estimated value of under \$100.***

A Department Manager must approve the disposal of any item(s) no longer useful to a Department that has an estimated value in his or her opinion of less than \$100. If the item(s) are not in working condition, the department will make arrangements to dispose of item(s). If the item is in working condition, the Department Manager will inform the Chief Procurement Officer of its availability and to see if it can be utilized elsewhere. The Chief Procurement Officer will notify other departments of its availability. If there is space to store it, the Department will make arrangements to have the items moved to the storage location.

The Chief Procurement Officer will keep an inventory of items in storage and {post the information on the Purchasing Website so that Departments can see what items are available}.

Employees are not allowed to take surplus equipment home for their personal use.

***Trade-in Provision***

A quote process can be used when trading in supplies with an estimated net value of less than \$10,000, when the new cost of the supply you are procuring is less than \$35,000.00.

Approved:

County Commissioners:

\_\_\_\_\_  
Ronald R. Beaty, Jr.

\_\_\_\_\_  
Mary Pat Flynn

\_\_\_\_\_  
Leo Cakounes

\_\_\_\_\_  
Date

# Memo

**To:** Jack Yunits, County Administrator  
**From:** Robert S. Troy, County Counsel *RST*  
**Date:** August 21, 2017  
**Re:** Bridgewater State University – Internship Program Office

---

Please be advised that I have Approved as to Form the attached Memorandum of Understanding with regard to the above-referenced matter.

RST:geo  
Cc: Commissioner Leo Cakounes

We, the undersigned, have read and agree with this MOU.

\_\_\_\_\_  
Leo Cakounes, Chairman  
Barnstable County Commissioners  
Date

\_\_\_\_\_  
Mary Pat Flynn, Vice-Chairwoman  
Barnstable County Commissioners  
Date

\_\_\_\_\_  
Ronald Beaty, Commissioner  
Barnstable County Commissioners  
Date

\_\_\_\_\_  
Jack Yunits, Jr., County Administrator  
County of Barnstable  
Date

\_\_\_\_\_  
Julie Ferguson, Director  
County of Barnstable – Resource Development Office  
Intern Supervisor  
Date

\_\_\_\_\_  
Diane Bell, Director  
Bridgewater State University – Internship Program  
Intern Supervisor  
Date

Approved as to Form  
  
Robert S Troy  
County Council  
8-21-17



**Memorandum of Understanding  
between  
the County of Barnstable  
and  
Bridgewater State University – Internship Program Office**

WHEREAS, young professionals have been leaving Cape Cod in large numbers due to inflated housing costs and an insubstantial job market, and;

WHEREAS, this exodus of young professionals has reduced the number of qualified professionals to fill employment vacancies in the County of Barnstable (the County), and;

WHEREAS, the County recognizes the importance of attracting young people to Cape Cod where they can accomplish meaningful goals, enhance skillsets that benefit the community and develop professional networks as they establish their careers, and;

WHEREAS, Bridgewater State University's (BSU) Internship Program students are eager to gain practical work experience, develop new skills, network and apply classroom theory in a professional setting;

THEREFORE, the County and BSU's Internship Program establish a partnership to provide internships within county departments for eligible students enrolled at BSU, with project-specific goals that are mutually beneficial and meet the needs of county departments and align with the academic and professional goals of the interns.

To satisfy the purposes of this agreement, the following services will be provided by County Department Managers, in collaboration with the Resource Development Office:

- orientation
- workplace supervision

- project-based activities
- pre-post assessments
- certificate of completion
- media coverage

BSU, in collaboration with the Director of the Internship Program, will provide:

- recruitment and marketing
- pre-orientation
- academic supervision
- stipends
- academic credits
- student liability insurance

The internships will coincide with the trimester sessions offered at BSU: Fall, Winter and Spring, beginning in fiscal year 2018.

Both parties agree to maintain effective communication and modify the roles and responsibilities as needed.

Both parties reserve the right to engage in additional partnerships not related to this internship MOU.

Both parties agree to abide by the “On Roads to Opportunity: Barnstable County Internship Program” Internship Policies and Procedures Manual (Attachment A).

This MOU is at-will and may be modified by mutual consent of authorized officials from the County of Barnstable and Bridgewater State University. Student interns are at will employees and the employment relationship may be terminated by either party at any time without cause or prior notice. This MOU shall become effective upon signature by the authorized officials from the County and BSU and will remain in effect until modified or terminated by any one of the partners by mutual consent. In the absence of mutual agreement by the authorized officials from BSU and the County, this MOU shall end 18 months from the date of latest signature.

We, the undersigned, have read and agree with this MOU.

---

Leo Cakounes, Chairman  
Barnstable County Commissioners

---

Date

---

Mary Pat Flynn, Vice-Chairwoman  
Barnstable County Commissioners

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Date

---

Ronald Beaty, Commissioner  
Barnstable County Commissioners

---

Date

---

Jack Yunits, Jr., County Administrator  
County of Barnstable

---

Date

---

Julie Ferguson, Director  
County of Barnstable – Resource Development Office  
Intern Supervisor

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Date

---

Diane Bell, Director  
Bridgewater State University – Internship Program  
Intern Supervisor

---

Date



# On Roads to Opportunity

## Internship Policies and Procedures Manual

**Barnstable County Guide for Hosting Interns in Partnership with  
Bridgewater State University**

RESOURCE DEVELOPMENT OFFICE

**TABLE OF CONTENTS**

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**Attachments:**

1. Student Internship Development Worksheet
2. Student Intern Appointment Letter Template
3. Exit Survey for Student Interns – Sample

## ON ROADS TO OPPORTUNITY INTERNSHIP

### A. PURPOSE

Barnstable County established a partnership with Bridgewater State University in order to provide a mutually beneficial system for growth and learning opportunities to students in college and post-college. This document provides the policy and processes specific to hosting interns from BSU.

Student interns are involved in education or training programs designed to provide them with professional experience in the furtherance of their education and training and are academically oriented for their benefit. Internships assist students in reaching their educational goals by giving them the opportunity to augment classroom instruction with exposure to a real-world employment setting.

### B. ESTABLISHING AN INTERNSHIP FOR STUDENTS

An internship is a planned program to provide a student with a meaningful learning experience applicable to the student's field of study during the course of a fall, spring or summer semester. This requires structured assignments coupled with appropriate supervision, evaluation, and feedback. Learning objectives will be developed with the University when considering a student internship opportunity. It is beneficial to have clear job duties that identify the learning objectives or a defined project scope that demonstrates how the learning objectives for each individual will be met.

The procedure for establishing a student internship is as follows:

- 1. Define the Work Program.** Prior to requesting a position for the intern, a department of Barnstable County should define a mutually beneficial project for the intern designed to provide meaningful experience generally applicable to a field of study offered at Bridgewater State University. The Internship Questionnaire can assist in defining the job description.
- 2. Resource Development Office Approval of Request.** After submission of the position request to the Resource Development Officer, RDO will review the position request. RDO may contact the department for additional information, if necessary. If approved, the request is routed to Bridgewater State University for review.

3. **Bridgewater State University Request.** BSU reviews the request for approval/denial. BSU may contact the department for additional information, if necessary.
4. Upon receipt of approval notification, BSU will post the internship and recruit candidates that meet the qualifications of the internship. Deadlines to apply will be established through Barnstable County Human Resource Department.
5. **Identify the Candidate.** Candidates will be selected for an interview. An RDO Officer and the person from the department that initiated the request for an intern will be present at the interviews.
6. **Complete the Onboarding.** In Collaboration with Barnstable County Human Resource Department a candidate is identified, hours worked verified and start date agreed upon.

#### **C. BARNSTABLE COUNTY'S RESPONSIBILITIES UPON ACCEPTANCE – STUDENT INTERN**

1. **Send Appointment Letter to Intern, copying BSU. Resource Development Office** provides the intern an appointment letter.
2. **Assign Intern to Orientation.** All interns must attend a general county orientation for all new interns at the beginning of the semester. Appointed department supervisors should provide a tour and introductions in their department after orientation. The Department Supervisor will develop a professional relationship with the student as an intern and not as an employee.
3. **Review Responsibilities with Supervisor**  
Meet with Intern Supervisor to go over responsibilities and provide him or her with supporting materials to encourage a successful intern placement. At this time, establish a schedule for checking in with the Resource Development Officer at the beginning, middle, and end of the semester.
4. **Complete General On-Boarding.** Complete any additional paperwork and processes associated with on-boarding an intern.

#### **D. COMPENSATION**

Student intern compensation is determined and provided by Bridgewater State University.

#### **E. EARNING ACADEMIC CREDIT**

Bridgewater State University, the student and the student's professor shall determine the number of academic credits earned from their internship at Barnstable County.

#### **F. STUDENT INTERN POSITION MONITORING**

Barnstable County Resource Development Office must regularly review the duties performed by student interns to ensure that they are engaged in meeting their learning objectives. An RDO Officer should schedule a meeting with the intern supervisor and the intern, at the beginning, middle, and end of the semester.

## **G. TERMINATION**

Student interns are at will employees and the employment relationship may be terminated by either party at any time without cause or prior notice. Upon termination of the internship, Barnstable County is encouraged to work with the student intern to determine whether the objectives of Barnstable County's On Roads to Opportunity Internship Program are being met. To facilitate that determination, a sample exit interview form for student interns follows in the Reference Documents section below.

## **H. COMPLETION OF INTERNSHIP**

Upon successful completion of the internship, a student will receive a Certificate of Participation, signed by the County Commissioners.

## **I. REFERENCE DOCUMENTS**

1. Student Intern Appointment Letter Template
2. Student Internship Position Questionnaire
3. Exit Survey for Student Intern – Sample
4. Participation in Barnstable County's On Roads to Opportunity Internship Program Certificate – Sample



## Sample Student Intern Appointment Letter Template

DATE

NAME

ADDRESS

ADDRESS

Dear NAME:

Welcome to Barnstable County. The purpose of this letter is to confirm your appointment to the position of Student Intern in the department of \_\_\_\_\_ at Barnstable County. The effective date of your hire is DATE.

This position reports to supervisor, title. Your primary work location will be in the \_\_\_\_\_ located at address.

This position's standard workweek is \_\_\_\_\_ hours and normal work hours are 8:30 am to 4:30 pm, Monday through Friday. You may discuss your specific schedule with your supervisor.

In this position you will summary of duties. Specific job duties will be discussed with you upon commencement of your internship.

You are required to comply with federal government work authorization requirements. Within the first three days of employment you must present document(s) that identify both your identity and ability to work in the United States. On your first day of work, you will meet with a Human Resources staff person who will provide more information.

You are scheduled to attend a New Employee Orientation at time on date, at \_\_\_\_\_ of the Resource Development Office, at \_\_\_\_\_. Your supervisor will arrange additional training for you including the mandatory web-based Ethics test.

Student internships are programs that provide students with exposure to workplace activities which are related to the intern's field of study. As a student intern, you are an at-will temporary employee and serve at the pleasure of the hiring authority; either you or the county may terminate your employment at any time with or without cause or prior notice.

The following items are important for you to know:

- You are ineligible for Barnstable County benefits.
- You may be separated from employment prior to the completion of the assignment without cause or prior notice.
- You do not attain any rights toward career service or regular employment.

- You are not represented by a labor union.
- To be eligible for hire into a career service position you must first compete in a formal selection process.

To qualify as a Student Intern, the following criteria must be met:

- You must be enrolled as a student at Bridgewater State University and participate in its internship/community service protocols.
- You must have a cumulative GPA of at least a 2.5 to be eligible for college credit and a cumulative GPA of at least 2.75 or higher to receive a stipend from Bridgewater State University.

If you have any questions about your position or any information in this letter, please contact name, title, at phone.

Congratulations on your appointment, and again, welcome to Barnstable County.

Sincerely,

Attachment

cc: SUPERVISOR



Exit Survey for Student Interns

We hope you enjoyed your learning experience with Barnstable County. So that we may learn from your experiences with us, we would appreciate your completing this exit survey. Survey responses provide valuable information the county can use for improving the learning experience of student interns.

**Name:** \_\_\_\_\_ **Supervisor/Mentor:** \_\_\_\_\_

**Department/Division:** \_\_\_\_\_ **Area of Study/Major:** \_\_\_\_\_

**Dates of Internship:** \_\_\_\_\_

**School Level (circle one):** Undergraduate, Graduate, Post-graduate

Were the following reasons important in your decision to intern with Barnstable County	Yes	Somewhat	No
Desire to work in the public/government sector after graduation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Barnstable County's reputation as a good learning environment for interns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
School credit or meeting an educational requirement from your internship	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Please describe your internship experience at Barnstable County including projects on which you participated and a description of typical daily activities performed**

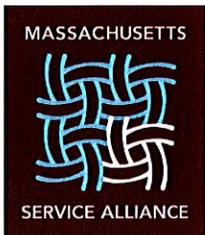
<b>Please tell us about your experience at Barnstable County</b>	<b>Strongly agree</b>	<b>Agree</b>	<b>Disagree</b>	<b>Strongly disagree</b>
I was able to develop skills related to my area of educational study	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I understood the learning objectives of my internship	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I received feedback on progress toward meeting my learning objectives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Please describe how this internship complimented your educational learning objectives**

<b>Please tell us about your experiences with your supervisor/mentor</b>	<b>Strongly agree</b>	<b>Agree</b>	<b>Disagree</b>	<b>Strongly disagree</b>
My supervisor/mentor was accessible and approachable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My supervisor/mentor exhibited genuine interest in my development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My supervisor/mentor provided learning opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Thank you for completing the survey. Your responses are valued and appreciated.**

**Please send completed surveys to:      Barnstable County Resource Development Office**



**BOARD OF DIRECTORS**

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CHAIR

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The TJX Companies, Inc.

**Emily Haber**

Chief Executive Officer

**EX-OFFICIO MEMBER**

**Sherry McClintock**

Corporation for National &  
Community Service

August 14, 2017

Ms. Julie Ferguson  
Barnstable County  
AmeriCorps Cape Cod  
3195 Main Street  
Barnstable, MA

Dear Ms. Ferguson:

The Massachusetts Service Alliance is pleased to be contracting with your agency for the 2017-2018 AmeriCorps grant year. Included are:

- 1) A copy of the Cooperative Agreement for your 2017-2018 AmeriCorps Program;
- 2) The approved budget for your 2017-2018 CNCS funds;
- 3) The 2017 AmeriCorps Terms and Conditions;
- 4) The Massachusetts Service Alliance 2017-2018 AmeriCorps Terms and Conditions Addendum.

The Cooperative Agreement will serve as the contract between our agencies. Please sign and send to Elizabeth Way, AmeriCorps Program Officer, electronically or by mail. If sending by e-mail, please sign a printed copy, scan the document, and retain that copy for your records. Should you have any questions, please do not hesitate to contact Elizabeth at (617) 542-2544, ext. 203 or [eway@mass-service.org](mailto:eway@mass-service.org).

It is our goal to provide quality communication, training, and technical assistance. Please feel free to call upon me or other MSA staff should you need our assistance. I hope that you will have a successful program year.

I look forward to working with you.

Sincerely,

Emily Haber  
Chief Executive Officer

**Massachusetts Service Alliance**

**And**

**Barnstable County**

**Cooperative Agreement Number: A-18-C-04-6001419**

**Grant Number: 15ACHMA001**

**Grant Start Date: 8/15/17**

**Grant End Date: 8/14/18**

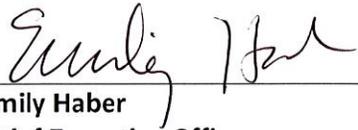
**Total Funding**

<b>Federal Funds Awarded</b>	<b>Total Award \$425,120</b>	<b>MSA Admin \$8,760</b>	<b>Total Program Funds \$416,360</b>
<b>Total Member Service Years</b>	32		
<b>Year in Graduated Match Schedule:</b>	10+		
<b>Required Aggregate Match Percentage:</b>	50%		

This Award / Amendment consists of these pages 1, 2, 3, 4, 5 and 6; Cooperative Agreement Terms numbered I-V, the attached budget forms, the 2017 AmeriCorps Terms and Conditions (May 1 2017), any updates to these Terms and Conditions, and the Massachusetts Service Alliance 2017-2018 AmeriCorps Grant Terms and Conditions Addendum (hereafter referred to as 'the Addendum').

**IN WITNESS THEREOF**, the parties have executed Cooperative Agreement Number **A-18-C-04-6001419**

Accepted and Agreed to by:  
**Massachusetts Service Alliance**  
**100 North Washington Street**  
**Boston, MA 02114**

  
\_\_\_\_\_  
**Emily Haber**  
**Chief Executive Officer**

8/14/17  
\_\_\_\_\_  
**Date**

**Barnstable County**  
**AmeriCorps Cape Cod**  
**3195 Main Street, P.O. Box 427**  
**Barnstable, MA 02630**

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Printed Name**

\_\_\_\_\_  
**Official Title**

\_\_\_\_\_  
**Date**

## COOPERATIVE AGREEMENT TERMS

### I. PROGRAM DESCRIPTION

The Grantee, in cooperation with the Massachusetts Service Alliance (MSA) and the Corporation for National and Community Service (the Corporation), hereby agrees to implement and oversee the AmeriCorps Cape Cod Program, operated by Barnstable County.

This program shall be conducted in accordance with the Grantee's 2017-2018 application and revisions, and with the attached program budget. The referenced application, revisions and attached budget define the objectives and manner of implementation of the program. **These, in no case, supersede the terms and conditions of this award. Any language of budget items contained in the approved application and budget do not change or take precedence over any requirements contained in this award and its Provisions.**

### II. PROGRAMS AND FUNDING

The funding for this program originates from the Federal Government. Prior to approving any amendments to the approved budget, the Grantee must provide a revised narrative and a budget in the same detail and format as the budget in this award to MSA. MSA must be able to clearly identify and track all funds that are awarded to the program, and retains the right to examine all supporting documents and review internal fiscal controls. All programs must comply with fiscal management guidelines as stated in the OMB circulars A-102, A-110 and A-133 as applicable.

### III. GRANTEE RESPONSIBILITIES

1. The Grantee receiving this award agrees to be responsible for all aspects of its programs including the management, oversight, operation and evaluation of the specified AmeriCorps program. The Grantee will work closely with MSA in implementing its AmeriCorps program.
2. The Grantee will implement its AmeriCorps program in accord with the National and Community Service Act of 1990, as amended (42 U.S.C. 12501, et seq.), the Corporation's regulations (45 CFR 2510, 2513, et al.), the Massachusetts Service Alliance 2017-2018 AmeriCorps Terms and Conditions Addendum, the AmeriCorps Application and the terms of this agreement.
3. Grantees are required to file National Service Trust forms, including Member Enrollment Forms and Change of Status forms in the My AmeriCorps portal no

later than 30 days after a member is enrolled, transferred, or suspended. Programs must also submit Exit/End-of-Term-of-Service Forms in the My AmeriCorps portal no later than 30 days after a member exits the program or completes his/her term of service. Failure to file member forms in the My AmeriCorps portal in a timely fashion may result in suspension of grant award. Suspension of grant award will mean that budget amendments will not be accepted and requests for reimbursement/advances will not be processed.

4. All new grantees will host a programmatic and a fiscal site visit. Failure to comply will result in suspension of the grant award. Suspension of grant award will mean that budget amendments would not be accepted and requests for reimbursement/advances will not be processed.
5. Grantees are required to submit requests for payments 30 days after the submission of Financial Status Reports (FSRs). Grantees, however, are strongly encouraged to submit monthly requests for Cash Reimbursement/Advances. Requests for Cash Reimbursement/Advance cover pages will only be accepted by mail. Periodic Expense Reports (PER's) will be accepted via mail or email. (For more specific information around FSR due dates please refer to the Massachusetts Service Alliance 2017-2018 Terms and Conditions Addendum #8, section a.i.) Grantees must submit requests for reimbursements by the 15<sup>th</sup> and 30<sup>th</sup> of each month. Accurate reimbursement requests received by the 15<sup>th</sup> will be processed and payments will be submitted to the grantee on the 30<sup>th</sup>. Accurate reimbursement requests received by the 30<sup>th</sup> will be processed and payments will be submitted to the grantee on the 15<sup>th</sup>. (For more information regarding reimbursements please refer to the MSA 2017-2018 AmeriCorps Terms and Conditions Addendum).
6. Grantees are required to submit 4 quarterly Financial Status Reports (FSR). FSRs are due to MSA 15 days after the close of each quarter. Should the 15<sup>th</sup> of the month fall on a holiday or weekend day, reports should arrive at MSA by the next business day. Grantees are required to submit an FSR on the due date and if a grantee fails to submit this report on the due date, the grant award is at risk of being suspended. Suspension of grant award will mean that budget amendments will not be accepted, and requests for reimbursement/advances will not be processed. (For more specific information around FSR due dates please refer to the Massachusetts Service Alliance 2017-2018 AmeriCorps Terms and Conditions Addendum #8, section a.i.)
7. Grantees are required to submit two Progress Reports during the program year. If a grantee fails to submit this report on the due date, the grant award is at risk of being suspended. Suspension of grant award will mean that budget amendments will not be accepted and requests for reimbursement/advances will not be processed. (For more specific information around Progress Report

due dates please refer to the Massachusetts Service Alliance 2017-2018 AmeriCorps Terms and Conditions Addendum #8, section a.ii.)

8. Grantees are to acknowledge the Massachusetts Service Alliance in all promotional and educational materials that pertain to the funded program. This includes, but is not limited to: special event invitations and speaking programs, promotional flyers, posters, pamphlets, event signage and printed programs, newsletters, web sites, videos, media interviews and events, press releases and advertisements. (For more specific information around Acknowledgement Format please refer to the Massachusetts Service Alliance 2017-2018 AmeriCorps Terms and Conditions Addendum #1, section i.)
9. MSA may suspend or terminate a grant award if necessary. (For more specific information around grant suspension and termination please refer to the Massachusetts Service Alliance 2017-2018 AmeriCorps Grant Terms and Conditions Addendum #14.)
10. In the event of natural disaster or emergency situation, members may be called upon to assist with the response. If disaster response is required, the hours contributed by the members would count toward their service commitment.

#### **IV. MSA RESPONSIBILITIES**

1. MSA will work closely with the Grantee to help assure the quality of the AmeriCorps program and to reasonably accommodate the needs of the AmeriCorps program for assistance.
2. MSA will provide access to technical assistance and training to the AmeriCorps program as agreed upon by both parties. Such assistance needs and provisions will be coordinated and assessed with the Grantee, MSA Program Officer, and MSA Director of Training and Technical Assistance.
3. MSA will review and respond to all requests within 30 days, including request for payments, budget amendments, and issues that necessitate Corporation involvement.

#### **V. ADMINISTRATIVE COSTS**

In accordance with AmeriCorps Regulation 45CFR 2521.95, each AmeriCorps program must either:

1. Establish administrative costs at a fixed 5% (or less) of total MSA funds expended and a match for administrative costs not to exceed 10% of direct costs in accordance with AmeriCorps Terms and Conditions 23, section c.
2. In accordance with AmeriCorps Regulation 45CFR 2521.95, Section d either:
  - a. use the Grantee's currently approved indirect cost rate to support the fixed 5% (or less) of MSA funds expended and the Grantee's match of administrative costs; or
  - b. establish an indirect cost rate to support the fixed 5% (or less) of total MSA funds expended and the grantee match.

Regardless of the option used to calculate administrative costs, MSA has set aside a portion of the federal share to use in administering the grant. Both MSA and the grantee portions of the federal share of administrative costs should be included in the budget. MSA amount is equal to but does not exceed 2% of the maximum 5% federal share. The grantee's portion therefore, must not exceed 3% of the maximum federal share.



# Massachusetts Service Alliance 2017-2018 AmeriCorps Terms and Conditions Addendum Items



The Corporation for National and Community Service may from time to time issue further guidance, clarifications, or modified provisions in order to implement the requirements of the Serve America Act and/or instructions issued by the Office of Management and Budget. As a result, it may be necessary for the Massachusetts Service Alliance (MSA) to modify this addendum in order to comply with such requirements. Grantees agree that any such supplementary guidance, clarifications, or provisions, shall become terms and conditions of this award.

All applicable Terms and Conditions of the Cooperative Agreement shall flow down to the grantee AmeriCorps Programs and other awards as applicable.

## **ADDENDUM #1**

*Page 3, Section III, Affiliation with the AmeriCorps National Service Program, subsection B.*

### **The MSA Name and Logo**

- i. Acknowledgement format.** Grantees are to acknowledge the Massachusetts Service Alliance in all promotional materials that pertain to the funded program. This includes, but is not limited to, special event invitations and speaking programs, newsletters, web sites, videos, media interviews and events, press releases and advertisements. Other examples include:
  - Service gear
  - Fundraising solicitations
  - Press releases
  - Signs
  - Stationary
  - Orientation materials
  
- ii. Proper acknowledgement means (use either a or b):**
  - a. Using the following credit line to recognize the Massachusetts Service Alliance: “<Name of Program>” is supported in part by the Massachusetts Service Alliance.”
  - b. Using MSA logos to recognize the Massachusetts Service Alliance and its relationship to your program.
  
- iii. Documenting your program.** As part of its mission to generate an ethic of service across the Commonwealth, MSA is interested in copies of photographs, printed articles, newsletters, news clippings, and other promotional materials that your program generates. Photos should illustrate Corps members engaged in service and must be accompanied by a release form signed by the photo subject, or if the photo subject is a minor, by the parent or guardian of the photo subject. This information may be used in the MSA newsletter, web site, or other promotional materials.
  
- iv. Engaging MSA in special events.** Grantees should send information about upcoming events and celebrations to their Program Officer well in advance of the event date.
  
- v. Program Directors’ Meetings.** MSA feels that it is crucial for program success to attend these events/meetings. Failure to participate may negatively impact future funding recommendations.
  - a. **Program Director Kickoff** – July 25<sup>th</sup> and 26<sup>th</sup>, 2017
  - b. **AmeriCorps Opening Day Activities** – November 3<sup>rd</sup>, 2017
  - c. **Program Director Meetings** – There will be 4 Program Director meetings during the 2017-2018 program year; exact dates and locations TBA
  - d. **Program Director Conference Calls** – as needed

## **ADDENDUM #2**

*Page 6, Section V, Supervision and Support, subsection B, Member Service Agreements*

**Member Service Agreements must also include:**

- Member's weekly schedule
- Required minimum of service hours and the exact end date of service
- Name and contact information of site supervisor and placement site
- Nondiscrimination clause
- Photo release
- Notice that the member has the right to file a grievance with MSA and that the program will notify MSA of any grievance procedure initiated against the program directly by an AmeriCorps member
- In the event that a member wishes to contact MSA directly, programs must also include contact information for the MSA Director of Programs in the member contract

**ADDENDUM #3**

*Page 9, Section V, Supervision and Support, subsection F, Timekeeping*

Programs may not release stipend payments to members for a period in which they have not received a member's timesheet accounting for all service hours completed within that time period, complete with member and supervisor signature.

**ADDENDUM #4**

*Page 12, Section VIII, Living Allowances, Other In-service Benefits and Taxes, subsection A*

**The grantee must ensure that members receive the following benefits:**

**Living allowances.** Unless otherwise agreed upon, a grantee must provide a living allowance to full-time members in accord with the following:

- Full time requirements.** The established range for a full time living allowance is between \$12,630 and \$24,930
- Part time requirements.** Programs are not required to pay part-time members living allowances. If a program chooses to pay part-time members, it must pro-rate the full-time living allowance based on the part-time member's service.
- Other Requirements.** Programs may not provide a living allowance benefit above \$24,930 for full-time members unless permitted under 42 U.S.C. paragraph 12594(c), or pro-rated based on number of hours for part-time. Programs in existence prior to September 21, 1993 may offer a lower living allowance than the minimum (\$12,630 for full-time members, or pro-rated for part-time).

Programs opting to deduct fines from members' living allowances must have MSA pre-approval, and then:

- Notify MSA Program Officer in writing.
- Submit copy of fining policy for review and approval by the Corporation for National and Community Service.
- Include policy in Contract signed by member.

**ADDENDUM #5**

*Page 13, Section VIII, Living Allowances, Other In-service Benefits and Taxes, subsection C, Unemployment Insurance*

**Note:** As per the Massachusetts Division of Career Services, Massachusetts AmeriCorps programs do **not** have to provide unemployment coverage for members and therefore this is not an allowable cost.

**ADDENDUM #6**

*Page 13, Section VIII, Living Allowances, Other In-service Benefits and Taxes, subsection C, Worker's Compensation*

**Note:** Massachusetts AmeriCorps programs **are** required to provide Worker's Compensation for AmeriCorps members.

**ADDENDUM #7**

*Matching Requirements*

- i. **Matching obligation.** The grantee must provide and account for the matching funds as agreed upon in the approved application and budget. Specific matching requirements depend upon the number of years a program has received funding. See chart below.

Program specific matching requirements for the 2017-2018 year can be found on page 1 of the contract.

- ii. **Progress towards fulfilling match.** Adequate progress towards meeting the proposed grantee match percentage is expected to be maintained throughout the year. Grantee match will be monitored on an ongoing basis by MSA staff.

**ADDENDUM #8**

	Year 1-3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Minimum Overall Share	24%	26%	30%	34%	38%	42%	46%	50%
Minimum Overall Share (Alternative)	N/A	N/A	N/A	N/A	29%	31%	33%	35%

***Pages 17-18, Section X, Budget and Programmatic Changes***

**Programmatic changes.** The grantee must obtain the prior written approval of the Massachusetts Service Alliance before making the following changes in the approved program:

- i. Changes in the scope, objectives, or goals of the program, whether or not they involve budgetary changes;
- ii. Changes in slot configuration or slot conversions;
- iii. Substantial changes in the level of participant supervision;
- iv. Entering into sub-grants or contracting out any AmeriCorps Program activities funded by the grant and not specifically identified in the approved application and grant.
- v. Depending on the nature of the request, MSA may need to receive the approval of the Corporation before granting final approval of any changes.

**Budgetary Changes.** The grantee must obtain the prior written approval of the Massachusetts Service Alliance before deviating from the approved budget in any of the following ways:

- i. **Reallocation of funds deemed Member Support Costs is allowed.** However, the grantee must submit a written request to MSA prior to reallocating funds from these lines. The specific line items covered by this sub-clause are:
  - a. Living allowance,
  - b. FICA and worker’s compensation, and
  - c. Health care (or alternative health care).
- ii. **Specific costs requiring prior approval before incurrence** under OMB Circulars A-21, A-87 or A-122. For certain cost items, the cost circulars require approval of the awarding agency for the cost to be allowable. Examples of these costs are: overtime pay, rearrangement and alteration costs, and pre-award costs.
- iii. **Purchases of equipment having a useful life of one year and a cost of \$5,000** using grant funds, unless specified in the approved application and budget.
- iv. **Budgetary transfers to absorb administrative costs** above the amount specified in the approved budget, if below the 5% maximum limit.
- v. Depending on the nature of the request, the MSA may need to receive the approval of the Corporation before granting final approval of any changes.

## ADDENDUM #9

### *Pages 18-19, Section XI, Reporting Requirements*

Financial Status and Progress Reports. Grantees are required to submit quarterly Financial Status Reports and two Progress Reports to the Massachusetts Service Alliance. Programs must submit these reports by the dates listed below.

- i. **Financial Status Reports (FSR 269a).** AmeriCorps\*State programs must submit a Financial Status Report (FSR 269a) 15 days after the close of each calendar quarter to MSA.

October 1 through December 31	FSR due January 15
January 1 through March 31	FSR due April 15
April 1 through June 30	FSR due July 15
July 1 through September 30	FSR due October 15

*If the FSR due date falls on a holiday or weekend day, the FSR will be due on the next business day.*

- ii. **Progress Reports.** Programs must submit 2 progress reports, one mid-year and one that covers the mid to the end of program to the MSA. The mid-year report will be due April 15, 2018 and will cover progress made from the program's start date to March 31, 2018. The final report will be due October 15, 2018 and will cover all information from the program's start date to the program's end date. Guidance on topics and formats will be provided by MSA prior to the reporting deadline.
- iii. **Final Financial Status Reports.** Grantees completing their third year funding cycle must submit, in lieu of the last quarterly FSR, a final FSR that is cumulative over the entire grant period. This FSR is due 60 days after the close of the grant.

## ADDENDUM #10

- i. **Timeliness.** Grantees must respond to all programmatic and financial reporting requests correctly and on time. The ability to respond to all program and financial reporting requests correctly and on time, as requested by MSA, will affect the grantee's future funding. Failure to submit reports in a timely fashion may result in a suspension of the grant.
- ii. **Enrollment and retention.** MSA and CNCS expect 100% enrollment and retention. Grantees enrolling and retaining less than 100% of members in relation to slots granted should be aware that this could negatively affect future chances of funding. This will be reviewed on a case-by-case basis.
- iii. **Timelogs.** Background check and member hours tracking document must be updated within 30 days of the month service was performed. A copy of the tracking document must be sent in with each reimbursement request.

## ADDENDUM #11

- i. **Payment.** Grantees must submit requests for payments 30 days after the submission of FSRs using approved request forms with a copy of the FSR and final PER for that period.

*Request for payment for expenditures through June 30, 2018 must be submitted with the FSR on July 15, 2018.*

- ii. **Reimbursements.** Grantees must submit requests for reimbursements by the 15th and 30th of each month. Accurate reimbursement requests received by the 15th will be processed and payments will be submitted to the grantee on the 30th. Accurate reimbursement requests received by the 30th will be processed and payments will be submitted to the on the 15th. Inaccurate reimbursement requests will be sent back to the grantee for revision. The revised request may then be re-submitted to the next reimbursement request cycle. All requests must include a Periodic Expense Report, a General Ledger, a clear reconciliation report, a narrative to explain the accounting system and an up-to-date copy of the background check and member hours tracking document.
- iii. **Monitoring match percentage.** Grantees' progress towards meeting the proposed match percentage will be monitored. Grantees whose match percentage is 10% or more below the proposed level at the time of submitting a PER should notify their Program Officer.

## **ADDENDUM #12**

### ***Monitoring Visits***

MSA will visit every funded program at least once in the three year grant cycle. At a minimum, newly funded programs will receive a site visit in the first year of the three grant cycle. During site visits, MSA will review and evaluate records, accomplishments, organizational procedures and financial control systems, conduct interviews with program directors, other staff, AmeriCorps members (without program staff present), community partners, and, when possible, service recipients; and provide technical assistance as necessary.

Fiscal compliance review may occur at the same time as programmatic site visits or may take place during a separately scheduled visit. Areas for fiscal review may include general management, financial and operational areas, and compliance with the AmeriCorps grant requirements and any audit issues.

## **ADDENDUM #13**

### ***Program Systems & Binder***

Grantees required to submit an operational systems and program binder for review will be notified by an MSA Program Officer by August 2017. Any issues identified through the review will need to be addressed within 30 days of notification.

## **ADDENDUM #14**

### ***Submission of Audit***

Grantees must annually submit the organization's most recent audit. This must be submitted when the mid-year progress report is submitted on March 15th of each year.

## **ADDENDUM #15**

### ***Suspension or Termination of a Grant***

- i. Suspension of the grant.** The Massachusetts Service Alliance may suspend a Grant and review the situation in 30 calendar days. Examples of such situations may include, but are not limited to:
  - a. Serious risk to persons or property;
  - b. Violations of Federal, State, or local criminal statutes;
  - c. Materials violation(s) of the Grant or contract that are sufficiently serious that they outweigh the general policy in favor of advance notice and opportunity to show cause; and
  - d. Delinquent information or reports.
- ii. Termination of the grant.** The Massachusetts Service Alliance may terminate payments under the grant, revoke or recover Grant funds for failure to comply with applicable provisions of this Grant.

**2017 Terms and Conditions for AMERICORPS STATE and  
NATIONAL GRANTS**

Effective May 1, 2017

**These Corporation for National & Community Service (CNCS) Grant Program Specific Terms and Conditions and the General Terms and Conditions, are binding on the recipient.**

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## I. CHANGES FROM THE 2016 AMERICORPS GRANT PROVISIONS

For your convenience, we have identified changes from last year's AmeriCorps State and National grant terms and conditions. The list below is general and informational in nature, not comprehensive. We reiterate the importance of reviewing all award terms and conditions, because recipients are responsible for knowing, understanding, and complying with all award terms and conditions.

1. Section VIII.F. – Changed the title of the section and included language regarding temporarily suspended members with regards to the childcare benefit program.
2. Section X.C.I. - Updated the language regarding pre-approval of costs.
3. Revised Section XV. – Updated the link for the e-Course and included Litmos access information.
4. Section XVII – Added the section on Breaches of PII

## II. DEFINITIONS

- A. **Recipient**, for the purposes of this agreement, means the direct recipient of this award. The recipient is legally accountable to CNCS for the use of award funds, or member positions, and is bound by the provisions of the award. The recipient is responsible for ensuring that subrecipients or other organizations carrying out activities under this award comply with all applicable Federal requirements, including the CNCS General Terms and Conditions, these specific terms and conditions, regulations applicable to the program, and the NCSA.
- B. **Planning Grant**, for the purposes of this agreement, is an award or subaward for the planning of a national service program. State Service Commissions may also award planning grants as part of their Formula Cost Reimbursement prime award. Planning grants do not include member positions. Planning grants are awarded for a maximum of one year, and may not exceed \$75,000 per program.
- C. **Subrecipient** refers to an organization receiving AmeriCorps award funds or member positions from a recipient of CNCS funds. See 2 CFR § 200.93.
- D. **Operating site** means the organization that manages the AmeriCorps program and places members into service locations. State subrecipients (programs) are operating sites. National recipients must identify at least one operating site to which they can assign service locations in the state where they are placing members.
- E. **Program** refers to the activities supported under the award.

- F. **Service Location** means the organization where or with which a member actually provides his or her service in the community. Typical service locations are schools, food banks, health clinics, community parks, etc. The service location may be the same as the operating site, but only if the member actually serves at or with the operating site organization. A member may serve at multiple service locations, all of which must be listed in the portal, although the program must select only one for the member's primary assignment.
- G. **Member or participant** means an individual:
1. Who has been selected by a recipient or subrecipient to serve in an approved national service position;
  2. Who is a U.S. citizen, U.S. national, or lawful permanent resident alien of the United States;
  3. Who is at least 17 years of age at the commencement of service unless the member is out of school and enrolled in a full-time, year-round youth corps or full-time summer program as defined in the NCSA (42 U.S.C. § 12572 (a)(3)(B)(x)), in which case he or she must be between the ages of 16 and 25, inclusive, and
  4. Who has received a high school diploma or its equivalent, agrees to obtain a high school diploma or its equivalent (unless this requirement is waived based on an individual education assessment conducted by the program) and the individual did not drop out of an elementary or secondary school to enroll in the program, or is enrolled in an institution of higher education on an ability to benefit basis and is considered eligible for funds under 20 U.S.C. § 1091 (See Section IX. B.).
- H. **NCSA** means the National and Community Service Act of 1990, as amended. See 45 U.S.C. §§ 12501-12657.

### III. **AFFILIATION WITH THE AMERICORPS NATIONAL SERVICE PROGRAM**

- A. **Identification as an AmeriCorps Program or Member.** The recipient shall identify the program as an AmeriCorps program and members as AmeriCorps members. All agreements with subrecipients, operating sites, or service locations, related to the AmeriCorps program must explicitly state that the program is an AmeriCorps program and AmeriCorps members are the resource being provided.
- B. **The AmeriCorps Name and Logo.** AmeriCorps is a registered service mark of CNCS. CNCS provides a camera-ready logo. All recipient and subrecipient websites shall clearly state that they are an AmeriCorps recipient and shall prominently display the AmeriCorps logo. Recipients and subrecipients shall use the AmeriCorps name and logo on service gear

and public materials such as stationery, application forms, recruitment brochures, on-line position postings or other recruitment materials, orientation materials, member curriculum materials, signs, banners, websites, social media, press releases, and publications related to their AmeriCorps program in accordance with CNCS requirements.

To publicize the relationship between the program and AmeriCorps, the recipient shall describe their program as “an AmeriCorps program.” Recipients shall provide information or training to their AmeriCorps members about how their program is part of the national AmeriCorps program and about the other national service programs of CNCS. Recipients are strongly encouraged to place signs that include the AmeriCorps name and logo at their service sites and may use the slogan “AmeriCorps Serving Here.” AmeriCorps members should state that they are AmeriCorps members during public speaking opportunities.

The recipient may not alter the AmeriCorps logo, and must obtain written permission from CNCS before using the AmeriCorps name or logo on materials that will be sold, or permitting donors to use the AmeriCorps name or logo in promotional materials. The recipient may not use or display the AmeriCorps name or logo in connection with any activity prohibited by statute, regulation, or CNCS General Terms and Conditions, and these specific award terms and conditions.

#### **IV. MEMBER RECRUITMENT, SELECTION, AND EXIT**

Member recruitment and selection requirements are in CNCS’s regulations at 45 CFR §§ 2522.210 and Part 2540, subpart B. In addition, the recipient must ensure that the following procedures are followed:

- A. **Notice to CNCS’s National Service Trust.** The recipient must notify CNCS’s National Service Trust, via the MyAmeriCorps Portal, within 30 days of a member’s start of, completion of, suspension from, or release from, a term of service. Suspension of service is defined as an extended period during which the member is not serving, nor accumulating service hours or receiving AmeriCorps benefits. AmeriCorps members must complete their own enrollment and exit forms on-line in the MyAmeriCorps Member Portal. All competitive recipients and subrecipients that wish to utilize staff Portal enrollments and exits without members completing enrollment and exit forms must send a request to their CNCS Program Officer. (Subrecipient requests should be submitted by state commissions.) Requests will be approved in cases where the recipient or subrecipient is able to demonstrate that technological limitations make it impossible or extremely burdensome for members to complete their own enrollment and exit forms in the Portal. Technological limitations would include lack of internet access, computer, and/or cell phone, or a member population with low computer literacy skills that

cannot be addressed through training or technical assistance. For formula programs, state commissions may choose to review requests from their subrecipients, consistent with the conditions outlined above, or they may choose not to allow any subrecipients to use paper forms. Approved waivers are valid for one-year only. Recipients are required to reapply for a waiver each year as necessary.

The recipient also must notify the Trust, via the My AmeriCorps Portal, when a change in a member's term of service is approved and changed (i.e. from full-time to less than full-time or vice versa). Failure to report such changes within 30 days may result in sanctions to the recipient, up to and including, suspension or termination of the award. Recipients or subrecipients meet notification requirements by using the appropriate electronic system to inform CNCS of changes within the required time frames. Any questions regarding the Trust should be directed to the Trust Office (800) 942-2677.

- B. **Parental Consent.** Parental or legal guardian consent must be obtained for members under 18 years of age before members begin a term of service. Recipients may also include an informed consent form of their own design as part of the member service agreement materials.
- C. **Reasonable Accommodation.** Programs and activities must be accessible to persons with disabilities, and the recipient must provide reasonable accommodation to the known mental or physical disabilities of otherwise qualified members, service recipients, applicants, and staff. All selections and project assignments must be made without regard to the need to provide reasonable accommodation. See the FAQ for more information: <http://www.nationalservice.gov/sites/default/files/upload/policy%20FAQs%207.31.14%20final%20working%20hyperlink.pdf>.
- D. **Assigning Members to Service Locations.** The recipient is required to ensure that all operating sites and all service locations are entered in the My AmeriCorps portal for all members within 30 days of members' starting a term of service. The recipient is required to include the name of the organization, and the full address or zip-plus-four of the service locations where each member will be serving. If a member is serving at multiple service locations, the program must select as the member's primary assignment the one where the member serves a majority of his or her hours. However, all service locations must be listed in the portal.
- E. **Completion of Terms of Service.** The recipient must ensure that each member has sufficient opportunity to complete the required number of hours of service to qualify for the education award. Members must be exited within 30 days of the end of their term of service. If this award expires or is not renewed, a member who was scheduled to continue in a

term of service may either be placed in another program, where feasible, or if the member has completed at least 15% of the service hour requirement, the member may receive a pro-rated education award.

- F. **Member Exit.** In order for a member to receive an education award from the National Service Trust, the recipient must certify to the National Service Trust that the member satisfactorily and successfully completed the term of service, and is eligible to receive the education benefit. The recipient (and any individual or entity acting on behalf of the recipient) is responsible for the accuracy of the information certified on the end-of-term certification.
- G. **Penalties for false information:** Any individual who makes a materially false statement or representation in connection with the approval or disbursement of an education award or other payment from the National Service Trust may be liable for the recovery of funds and subject to civil and criminal sanctions.

## V. SUPERVISION AND SUPPORT

- A. **Planning for the Term of Service.** The recipient must develop member positions that provide for meaningful service activities and performance criteria that are appropriate to the skill level of members. The recipient is responsible for ensuring that the positions do not include or put the AmeriCorps member in a situation in which the member is at risk for engaging in any prohibited activity (see 45 CFR § 2520.65), activity that would violate the non-duplication and non-displacement requirements (see 45 CFR § 2540.100), or exceeding the limitations on allowable fundraising activity (see 45 CFR §§ 2520.40-.45). The recipient must accurately and completely describe the activities to be performed by each member in a position description. Position descriptions must be provided to CNCS upon request. The recipient must ensure that each member has sufficient opportunity to complete the required number of hours to qualify for an education award. In planning for the member's term of service, the recipient must account for holidays and other time off, and must provide each member with sufficient opportunity to make up missed hours.
- B. **Member Service Agreements.** The recipient must require that each member sign a member service agreement that includes, at a minimum, the following:
  - 1. Member position description;
  - 2. The minimum number of service hours (as required by statute) and other requirements (as developed by the recipient) necessary to successfully complete the term of service and to be eligible for the education award;

3. The amount of the education award being offered for successful completion of the terms of service in which the individual is enrolling;
4. Standards of conduct, as developed by the recipient or sub recipient;
5. The list of prohibited activities, including those specified in the regulations at 45 CFR § 2520.65 (see paragraph C, below);
6. The text of [45 CFR §§ 2540.100\(e\)-\(f\)](#), which relates to Non-duplication and Nondisplacement;
7. The text of [45 CFR §§ 2520.40-45](#), which relates to fundraising by members;
8. Requirements under the Drug-Free Workplace Act (41 U.S.C. § 701 *et seq.*);
9. Civil rights requirements, complaint procedures, and rights of beneficiaries;
10. Suspension and termination rules;
11. The specific circumstances under which a member may be released for cause;
12. Grievance procedures; and
13. Other requirements established by the recipient.

The recipient should ensure that the service agreement is signed before commencement of service so that members are fully aware of their rights and responsibilities.

C. **Prohibited Activities.** While charging time to the AmeriCorps program, accumulating service or training hours, or otherwise performing activities supported by the AmeriCorps program or CNCS, staff and members may not engage in the following activities (see 45 CFR § 2520.65):

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—
    - a. A business organized for profit;
    - b. A labor union;
    - c. A partisan political organization;
    - d. A nonprofit organization that fails to comply with the restrictions contained in section 501(c)(3) of the Internal Revenue Code of 1986 related to engaging in political activities or substantial amount of lobbying except that nothing in these provisions shall be construed to prevent participants from engaging in advocacy activities undertaken at their own initiative; and
    - e. An organization engaged in the religious activities described in paragraph C. 7. above, unless CNCS assistance is not used to support those religious activities;
  9. Conducting a voter registration drive or using CNCS funds to conduct a voter registration drive;
  10. Providing abortion services or referrals for receipt of such services; and
  11. Such other activities as CNCS may prohibit.

AmeriCorps members may not engage in the above activities directly or indirectly by recruiting, training, or managing others for the primary purpose of engaging in one of the activities listed above. 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-CNCS funds. Individuals should not wear the AmeriCorps logo while doing so.

- D. **Supervision.** The recipient must provide members with adequate supervision by qualified supervisors consistent with the award. The recipient must conduct an orientation for members, including training on what activities are prohibited during AmeriCorps service hours, and comply with any pre-service orientation or training required by CNCS. The recipient must ensure that it does not exceed the limitation on member service hours spent in education and training set forth in 45 CFR § 2520.50.
- E. **Performance Reviews.** The recipient must conduct and keep a record of at least a midterm and an end-of-term written evaluation of each member's performance for Full and Half-Time members and an end-of-term written evaluation for less than Half-time members. The end-of-term evaluation should address, at a minimum, the following factors:
  1. Whether the member has completed the required number of hours;

2. Whether the member has satisfactorily completed assignments; and
3. Whether the member has met other performance criteria that were clearly communicated at the beginning of the term of service.

F. **Timekeeping.** The recipient is required to ensure that time and attendance recordkeeping is conducted by the AmeriCorps member's supervisor. This time and attendance record is used to document member eligibility for in-service and post-service benefits. The recipient must have a timekeeping system that is compliant with 2 CFR § 200.430.

If a Professional Corps program wants to follow the timekeeping practices of its profession and certify that members have completed the minimum required hours, excluding sick and vacation days, it must get advance written approval from CNCS. If a State Commission Formula funded Professional Corps program wants to follow the timekeeping practices of its profession and certify that members have completed the minimum required hours, excluding sick and vacation days, it must get advance written approval from the State Commission.

G. **Member Death or Injury.** The recipient must immediately report any member deaths or serious injuries to the designated CNCS Program Officer.

## VI. CHANGES IN MEMBER POSITIONS

A. **Changes that Require CNCS Approval.** Circumstances may arise within a program that necessitate changing the type of unfilled AmeriCorps member positions awarded to a recipient or subrecipient, or changing the term of service of a currently enrolled member. Note that once a member is exited with a partial education award, the remaining portion of that education award is not available for use. The following changes require written approval from CNCS's Office of Grants Management as well as written approval and concurrence from the State Commission or Direct (including National Direct, State Direct, Tribal, Territory Direct, or Education Award Only (EAP)) recipient:

1. A change in the number of member service year (MSY) positions in the award; and/or
2. A change in the funding level of the award.

B. **Changing Types of Unfilled member positions.** Recipients or subrecipients may change the type of member positions awarded to their program if:

1. The change does not increase the total MSYs authorized in the Notice of Grant Award (e.g. one half-time position cannot be changed to one full-time position); and

2. The change does not result in an increase in the value of the education award; and,
3. If the award is a Full-cost Fixed Amount or Professional Corps Fixed Amount award, the member position will be filled by a member serving in a full-time capacity.

Changes in types of member positions may be made by the recipient directly in the My AmeriCorps Portal.

C. **Changing a Term of Service for an enrolled Member.** Changes in terms of service for enrolled members may not result in an increased number of MSYs for the program. With the exception of Education Award only awards, recipients with Fixed Amount awards may not convert members to less-than-full-time member positions. All changes to types of member positions are subject to availability of funds in the Trust.

1. **Full-time.** State Commissions and National Direct Organizations may authorize or approve occasional changes of currently enrolled full-time members to less than full-time members. Impact on program quality should be factored into approval of such requests. CNCS-provided or funded health care or childcare costs are not available for less than full-time members. Recipients and subrecipients may not transfer currently enrolled full-time members to a less than full-time status simply to provide the member a less than full-time education award.
2. **Less than Full-time.** CNCS discourages changing less than full-time members to full-time because it is very difficult to manage, unless done very early in the member's term of service. State Commissions and Direct recipients (including National Direct, State Direct, Tribal, Territory Direct, and Education Award Only recipients) may authorize or approve such changes so long as their current budget can accommodate such changes. Programs must keep in mind that a member's minimum 1700 hours must be completed within 12 months of the member's original start date.
3. **Refilling Member Positions.** With the exception of recipients whose awards have special award conditions under 2 CFR §§ 200.207 or 200.338, AmeriCorps State and National programs that have fully enrolled their awarded member positions are allowed to replace any member who terminates service before completing 30 percent of his/her term *provided that the member who is terminated is not eligible for and does not receive a pro-rated education award.* Programs may not refill the same member position more than once.

As a fail-safe mechanism to ensure that resources are available in the National Service Trust to finance all earned education awards, CNCS will suspend refilling if either:

- a. Total AmeriCorps enrollment reaches 97 percent of awarded member positions; or
  - b. The number of refills reaches five percent of awarded member positions.
4. Direct recipients may transfer refill member positions between operating sites as long as they can ensure and document that the same member position is not refilled more than once. Recipients and subrecipients will require the assistance of a CNCS Program Officer in order to transfer refill member positions between operating sites. Refilled member positions may not be combined with unfilled member positions.

- D. **Formula and State Competitive Award Member Position Transfers.** State commissions are allowed to transfer member positions among their state formula and competitive subrecipients within a given prime grant in order to maximize enrollment and cost effectiveness without prior approval. State commissions may not transfer member positions between competitive and formula subrecipients, or vice-versa. State commissions may not transfer funds among their competitive subrecipients.
- E. **Notice to Childcare and Healthcare Providers.** Recipients and subrecipients must immediately notify CNCS's designated agents, in writing, when a Member's status changes in a manner that affects their eligibility for childcare or healthcare. See Section VIII.D.

## VII. RELEASE FROM PARTICIPATION

Recipients may release members from participation for two reasons: (a) for compelling personal circumstances; and (b) for cause. See 45 CFR § 2522.230 for requirements. Whether the reason for the release amounts to circumstances beyond the member's control is determined by the recipient, consistent with the criteria listed in 45 CFR § 2522.230(a). Failure to follow the requirements set forth in regulation (e.g., releasing an individual for a non-compelling personal circumstance, such as when the individual is leaving to go to school) is considered non-compliance with award requirements and may result in disallowed costs and other remedies for non-compliance. The recipient should retain the documentation supporting its determination to release an individual for compelling personal circumstances. In addition to the regulations, the following applies:

***No Automatic Disqualification if Released for Cause:*** A release for cause covers all circumstances in which a member does not successfully complete his/her term of service for reasons other than compelling personal circumstances.

Therefore, it is possible for a member to receive a satisfactory performance review and be released for cause. For example, a member who is released for cause from a first term—e.g. the individual has decided to take a job offer—but who otherwise performed well—would, not be disqualified from enrolling for a subsequent term as long as the individual received a satisfactory performance evaluation for the first period of service.

## VIII. LIVING ALLOWANCES, OTHER IN-SERVICE BENEFITS, AND TAXES

Requirements related to member living allowances and benefits are in 45 CFR §§ 2522.240 and 2522.250. In addition, recipients must ensure that the following procedures are followed:

- A. **Living Allowance Distribution.** A living allowance is not a wage. Recipients must not pay a living allowance on an hourly basis. Recipients should pay the living allowance in regular increments, such as weekly or bi-weekly, paying an increased increment only on the basis of increased living expenses such as food, housing, or transportation. Payments should not fluctuate based on the number of hours served in a particular time period, and must cease when the member's service ceases.

If a member serves all required hours and is permitted to conclude his or her term of service before the originally agreed upon end of term, the recipient may not provide a lump sum payment to the member. Similarly, if a member is selected after the program's start date, the recipient must provide regular living allowance payments from the member's start date and may not increase the member's living allowance incremental payment or provide a lump sum to make up any missed payments.

Education Award Program Fixed Amount awards (EAPs) and Partnership Challenge awards may provide a living allowance or other in-service benefits to their members, but are not required to do so. Full-cost and other Fixed Amount recipients must provide a living allowance to their members.

- B. **Waiving the Living Allowance.** If a living allowance is paid, a member may waive all or part of the payment of a living allowance if, for example, he or she believes his or her public assistance may be lost or decreased because of the living allowance. Even if a member waives his or her right to receive the living allowance, it is possible—depending on the specific public assistance program rules—that the amount of the living allowance that the member is eligible to receive will be deemed available. A member who has waived the living allowance may revoke the waiver at any time and may begin receiving the living allowance going forward from the date the individual revoked the waiver. A member may not receive any portion of the living allowance for the period of time the

living allowance was waived.

C. **Taxes and Insurance.**

1. **Liability Insurance Coverage.** The recipient is responsible for ensuring adequate general liability coverage for the organization, employees and members, including coverage of members engaged in on- and off-site project activities.
2. **FICA (Social Security and Medicare taxes).** Unless the recipient obtains a ruling from the Social Security Administration or the Internal Revenue Service that specifically exempts its AmeriCorps members from FICA requirements, the recipient must pay FICA for any member receiving a living allowance. The recipient also must withhold 7.65% from the member's living allowance.
3. **Income Taxes.** The recipient must withhold Federal personal income taxes from member living allowances, requiring each member to complete a W-4 form at the beginning of the term of service and providing a W-2 form at the close of the tax year. The recipient must comply with any applicable state or local tax requirements.
4. **Worker's Compensation.** Some states require worker's compensation for AmeriCorps members. Recipients must check with State Departments of Labor or state commissions to determine worker's compensation requirements. If worker's compensation is not required, recipients must obtain Occupational, Accidental, and Death and Dismemberment coverage for members to cover in-service injury or incidents.

- D. **Healthcare Coverage.** Except for EAPs, Professional Corps, Partnership Challenge awards, or members covered under a collective bargaining agreement, the recipient must provide, or make available, healthcare insurance to those members serving a 1700-hour full-time term who are not otherwise covered by a healthcare policy at the time the member begins his/her term of service. The recipient must also provide, or make available, healthcare insurance to members serving a 1700-hour full-time term who lose coverage during their term of service as a result of service or through no deliberate act of their own. CNCS will not cover healthcare costs for dependent coverage.

Less-than-full-time members who are serving in a full-time capacity for a sustained period of time (e.g. a full-time summer project) are eligible for healthcare benefits. Programs may provide health insurance to less-than-full-time members serving in a full-time capacity, but they are not required to do so. For purposes of this provision, a member is serving in a full-time capacity when his/her regular term of service will involve performing service on a normal full-time schedule for a period of six weeks or

more. A member may be serving in a full-time capacity without regard to whether his/her agreed term of service will result in a full-time Segal AmeriCorps Education Award.

Any of the following health insurance options will satisfy the requirement for health insurance for full-time AmeriCorps members (or less than full-time members serving in a full-time capacity): staying on parents' or spouse plan; insurance obtained through the Federal Health Insurance Marketplace of at least the Bronze level plan; insurance obtained through private insurance broker; Medicaid, Medicare or military benefits. AmeriCorps programs purchasing their own health insurance for members must ensure plans are minimum essential coverage (MEC) and meet the requirements of the Affordable Care Act.

On Friday May 2, 2014 the U.S. Department of Health and Human Services (HHS) announced a Special Enrollment Period (SEP) for members in AmeriCorps State and National programs, who are not provided health insurance options or who are provided short-term limited-duration coverage or self-funded coverage not considered MEC. Members in the AmeriCorps State and National programs and their dependents in the Federally-facilitated Marketplace (FFM) are eligible to enroll in Marketplace coverage when they experience the following triggering events:

- On the date they begin their service terms; and
- On the date they lose any coverage offered through their program after their service term ends. (Source: 45 CFR § 155.420(d)(9)).

Members have 60 days from the triggering event to select a plan. Coverage effective date is prospective based on the date of plan selection. A copy of the HHS Notice, which provides instructions on how to activate the special enrollment period, is available at <https://www.cms.gov/CCIIO/Resources/Regulations-and-Guidance/Downloads/SEP-and-hardship-FAQ-5-1-2014.pdf>. Members can also visit [healthcare.gov](http://healthcare.gov) for additional information about special enrollment periods: <https://www.healthcare.gov/coverage-outside-open-enrollment/special-enrollment-period/>.

If coverage is being provided via the Healthcare Marketplace, and thus third party payment is not an option, programs must develop a process to reimburse members for monthly premiums. Reimbursements for health insurance premiums are considered taxable income for the member, and programs must have a way to document such reimbursements.

- E. **Administration of Childcare Payments.** In general, CNCS will provide for childcare payments, which will be administered through an outside contractor. Requirements and eligibility criteria are in the AmeriCorps regulations, 45 CFR § 2522.250. CNCS will not cover childcare costs for members who served on a less than full-time basis for a sustained period

of time, or who have ceased serving. Programs may provide child care to less-than-full-time members serving in a full-time capacity, but they are not required to do so. Recipients that choose to provide childcare and will claim the costs of childcare as matching costs, as approved in their budget, may contact the childcare contractor for technical assistance. The criteria for member eligibility are contained in 45 CFR § 2522.250. Also see the FAQs, (<http://www.nationalservice.gov/sites/default/files/upload/policy%20FAQs%207.31.14%20final%20working%20hyperlink.pdf>) for more detailed information on administering childcare and healthcare benefits.

- F. **Notice to Childcare Benefit Administrator and Providers.** The program must notify CNCS's designated agents in writing within five business days after a member's status changes in a manner that affects the member's eligibility for childcare. After five days, the recipient will be liable for any erroneous payments made to a childcare provider for an AmeriCorps member ineligible to receive AmeriCorps childcare benefits. Examples of changes in status include: changes to a member's scheduled service so that he/she is no longer serving on a full-time basis, terminating or releasing a member from service, suspending a member for cause for a lengthy or indefinite time period, temporarily suspending a member for cause for a lengthy or indefinite time period, temporarily suspending a member and/or any other change in the member's service status that could have an impact on childcare benefit eligibility. Program directors should contact the childcare provider on childcare related changes.

## **IX. MEMBER RECORDS AND CONFIDENTIALITY**

- A. **Recordkeeping.** The recipient must maintain records, including the position description, sufficient to establish that each member was eligible to participate and that the member successfully completed all program requirements. A program may store member files electronically and use electronic signatures if the program can ensure the validity and integrity of the record and signature is maintained.

The program's electronic storage procedures and system must provide for the safe-keeping and security of the records, including:

1. Sufficient prevention of unauthorized alterations or erasures of records;
2. Effective security measures to ensure that only authorized persons have access to records;
3. Adequate measures designed to prevent physical damage to records; and
4. A system providing for back-up and recovery of records; and

The electronic storage procedures and system provide for the easy retrieval of records in a timely fashion, including:

1. Storage of the records in a physically accessible location;
2. Clear and accurate labeling of all records; and
3. Storage of the records in a usable, readable format.

- B. **Verification of Eligibility.** Unless an individual's social security number and citizenship was verified through the My AmeriCorps Portal, the recipient must obtain and maintain documentation as required by 45 CFR § 2522.200(c). CNCS does not require programs to make and retain copies of the actual documents used to confirm age or citizenship eligibility requirements, such as a driver's license, or birth certificate, as long as the recipient has a consistent practice of identifying the documents that were reviewed and maintaining a record of the review.

Enrolling in the My AmeriCorps portal requires members to certify their high school status. Such certification fulfills the recipient's verification requirement to obtain and maintain documentation from the member relating to the member's high school education. If the member is incapable of obtaining a high school diploma or its equivalent, as determined by an independent evaluation, the recipient must retain a copy of the supporting evaluation.

- C. **Confidential Member Information.** The recipient must maintain the confidentiality of information regarding individual members. The recipient must obtain the prior written consent of all members before using their names, photographs and other identifying information for publicity, promotional or other purposes. Recipients may release aggregate and other non-identifying information, and are required to release member information to CNCS and its designated contractors. The recipient must permit a member who submits a written request for access to review records that pertain to the member and were created pursuant to this award.
- D. **National Service Criminal History Check.** The specific requirements of the National Service Criminal History Check, including the timing and recordkeeping requirements, are specified at [45 CFR §§ 2540.200 - .207](#). *See also* the final rule and the CNCS website for more information. You must retain a record of the NSOPW search and associated results either by printing the screen(s) or by some other method that retains paper or digital images of the NSOPW checks, inclusive of the date record for when the search was performed. Inability to demonstrate that you conducted an NSOPW or the required criminal history check, as specified in the regulations, may result in sanctions, including disallowance of all or part

of the costs associated with the non-compliance or other remedies that may be legally available (see 2 CFR § 200.338).

## **X. BUDGET AND PROGRAMMATIC CHANGES**

A. **Programmatic Changes.** The recipient must first obtain the prior written approval of the AmeriCorps Program Office before making any of the following changes (1-3):

1. Changes in the scope, objectives or goals of the program, whether or not they involve budgetary changes;
2. Substantial changes in the level of member supervision;
3. Entering into additional sub awards or contracts for AmeriCorps activities funded by the award, but not identified or included in the approved application and award budget.

Upon notification to the AmeriCorps Program Office, recipients may make programmatic changes due to, or in response to, an officially-declared state or national disaster without written approval from CNCS. As soon as practicable, recipients making disaster-related programmatic changes must discuss the recordkeeping, member activities, performance measure adjustments, and other AmeriCorps award requirements with the AmeriCorps Program Office. While written approval from CNCS is not required before making disaster-related programmatic changes, CNCS reserves the right to limit or deny disaster-related programmatic changes, including disallowing costs associated with the disaster related activities.

B. **Program Changes for Formula Programs.** State Commissions are responsible for approving the above changes for state formula programs.

C. **Budgetary Changes.** The recipient must obtain the prior written approval of CNCS's Office of Grants Management before deviating from the approved budget in any of the following ways:

1. **Specific Costs Requiring Prior Approval before Incurrence** under the uniform administrative requirement, cost principles, and audit requirements for Federal awards at 2 CFR Parts 200 and 2205. Certain cost items in 2 CFR Parts 200 and 2205 require approval of the awarding agency for the cost to be allowable such as pre-award costs. Please ensure you consult the regulations prior to incurring costs to ensure allowability.
2. **Purchases of Equipment over \$5,000** using award funds, unless specified in the approved application and budget.

3. Unless the CNCS share of the award is \$100,000 or less, changes to cumulative and/or aggregate budget line items that amount to 10 per cent or more of the total budget must be approved in writing in advance by CNCS. The total budget includes both the CNCS and recipient shares. Recipients may transfer funds among approved direct cost categories when the cumulative amount of such transfers does not exceed 10 percent of the total budget.
- D. **Approvals of Programmatic and Budget Changes.** CNCS’s Grants Officers are the only officials who have the authority to alter or change the terms and conditions or requirements of the award. The Grants Officers will execute written amendments, and recipients should not assume approvals have been granted unless documentation from the Grants Office has been received. Programmatic changes also require final approval of CNCS’s Office of Grants Management after written recommendation for approval is received from the Program Office.
  - E. **Exceptions for Fixed Amount Awards.** Recipients with Fixed Amount awards are not subject to the requirements in Section C., Budgetary Changes, above.

## XI. REPORTING REQUIREMENTS

This section applies only to the recipient. The recipient is responsible for timely submission of periodic financial and progress reports during the project period and a final financial report and for setting submission deadlines for its respective subrecipients that ensure the timely submission of recipient reports.

- A. **Recipient Progress Reports.** The recipient shall complete and submit progress reports in eGrants to report on progress toward achievement of its approved performance targets.

<u>Due Date</u>	<u>Reporting Period Covered</u>
April 30	Start of award through March 31
October 31	Start of award year through end of award year or September 30, whichever is sooner

- B. **Financial Reports.** The recipient shall complete and submit financial reports in eGrants (Financial Status Reports on menu tree) to report the status of all funds. The recipient must submit timely cumulative financial reports in accordance with CNCS guidelines according to the following schedule:

<u>Due Date</u>	<u>Reporting Period Covered</u>
April 30	Start of award through March 31
October 31	April 1 – September 30

A recipient must set submission deadlines for its respective subrecipients that ensure the timely submission of recipient reports.

Cost reimbursement Professional Corps recipients submit one financial report per year.

All recipients, including Fixed Amount recipients, must submit the Federal Financial Report (FFR) - Cash Transactions Report on a quarterly basis to the Department of Health and Human Services Payment Management System per the Electronic Funds Transfer Agreement.

C. **Reporting Other Federal Funds.** The recipient shall report the amount and sources of federal funds, other than those provided by CNCS, claimed as matching funds. This includes other federal funds expended by subrecipients and operating sites and claimed as match. This information shall be reported annually on the financial report due October 31<sup>st</sup> or at the time the final financial report is submitted if the final report is due prior to October 31st. Fixed Amount recipients are not required to report this information.

D. **Requests for Extensions.** Each recipient must submit required reports by the given dates. Extensions of reporting deadlines will be granted only when 1) the report cannot be furnished in a timely manner for reasons, in the determination of CNCS, legitimately beyond the control of the recipient, and 2) CNCS receives a written request explaining the need for an extension before the due date of the report.

Extensions of deadlines for financial reports may only be granted by the Office of Grants Management, and extensions of deadlines for progress reports may only be granted by the AmeriCorps Program Office.

E. **Final Financial Reports.** A recipient must submit, in lieu of the last semi-annual financial report, a final financial report. This final report is due no later than 90 days after the end of the project period.

F. **Final Progress Reports.** A recipient must submit, in addition to the last semi-annual project report, a final project report. This final report is due no later than 90 days after the end of the project period.

G. **Financial Reports for Fixed Amount Awards.** Fixed Amount recipients are not required to submit financial reports to CNCS, including the final financial report.

## **XII. AWARD PERIOD AND INCREMENTAL FUNDING**

For the purpose of the award, a project period is the complete length of time the recipient is proposed to be funded to complete approved activities under the award. A project period may contain one or more budget periods. A budget period is a specific interval of time for which Federal funds are being provided to fund a recipient's approved activities and budget.

Unless otherwise specified, the award covers a three-year project period. In approving a multi-year project period, CNCS generally makes an initial award for the first year of operation. Additional funding is contingent upon satisfactory performance, a recipient's demonstrated capacity to manage an award and comply with award requirements, and the availability of Congressional appropriations. CNCS reserves the right to adjust the amount of an award, or elect not to continue funding for subsequent years. The project period and the budget period are noted on the award document.

A planning grant covers a one-year project period.

## **XIII. PROGRAM INCOME**

- A. **General.** Income, including fees for service earned as a direct result of the award-funded program activities during the award period, must be retained by the recipient and used to finance the award's non-CNCS share.
- B. **Excess Program Income.** Program income earned in excess of the amount needed to finance the recipient share must follow the appropriate requirements of 2 CFR Part 200 and be deducted from total claimed costs. Recipients that earn excess income must specify the amount of the excess in the comment box on the financial report.
- C. **Fees for Service.** When using assistance under this award, the recipient may not enter into a contract for or accept fees for service performed by members when:
  - 1. The service benefits a for-profit entity,
  - 2. The service falls within the other prohibited activities set forth in these award provisions, or
  - 3. The service violates the provisions of 42 U.S.C. § 12637 – Nonduplication and Nondisplacement.
- D. **Full-Cost and Professional Corps Fixed Amount Awards and Partnership Challenge Awards.** The recipient must notify its Grants Officer if it earns program income in excess of the amounts needed to cover all expenditures under the award. The Grants Officer will determine the disposition of the excess program income.

#### **XIV. SAFETY**

The recipient must institute safeguards as necessary and appropriate to ensure the safety of members. Members may not participate in projects that pose undue safety risks.

#### **XV. NATIONAL SERVICE CRIMINAL HISTORY CHECK TRAINING**

All recipients and subrecipients **must** complete CNCS NSCHC training every year. The CNCS designated e-course provides a thorough overview of the requirements and can be found at: <https://cncsonlinecourses.litmos.com?C=325500>. To request Litmos account access, email [servicesresources@cns.gov](mailto:servicesresources@cns.gov). Each grant recipient and subrecipient must identify at minimum one staff person who has some responsibility for NSCHC compliance to fulfill this requirement on behalf of the recipient or subrecipient. The grant recipient and subrecipient must retain the certificate of completion and assign staff to retake the course annually prior to the expiration of the certificate. Grant recipients and subrecipients should save certificates of completion from each year as grant records.

#### **XVI. FIXED AMOUNT AWARDS**

Fixed Amount awards are not subject to the cost principles in 2 CFR, Part 200, Subpart E. Fixed Amount awards must comply with the remaining provisions of 2 CFR Part 200, including Subpart F relating to audit requirements. Fixed Amount awards include Education Award program (EAP) Fixed Amount awards, Professional Corps Fixed Amount awards, Full-Cost Fixed Amount awards, and Partnership Challenge awards.

For Education Award programs (EAP), the fixed federal assistance amount of the award is based on the approved and awarded number of full-time members specified in the award. For full-cost and Professional Corps Fixed Amount awards, the fixed federal assistance amount of the award is based on the approved and awarded numbers of full-time members and the members' completion of their terms of service.

For EAPs, the final amount of award funds that the recipient may retain is dependent upon the recipient's notifying CNCS's National Service Trust of the members that it has enrolled. All EAP members must carry out activities to achieve the specific project objectives as approved by CNCS. At closeout, CNCS will calculate the final amount of the award based on Trust documentation. CNCS will recover any amounts drawn down by the recipient in excess of the final award amount allowed based on member selection documentation in the My AmeriCorps Portal.

For all other Fixed Amount awards, the recipient may draw funds from the HHS Payment Management System based on the number of members who complete a

full term of service or if the member leaves before completing service, a pro-rated amount based on hours served.

Full-cost and Professional Corps programs may draw up to 20% of the funds within the first two months to cover start-up costs (recruitment and application, training, criminal history checks, etc.); however, total funds drawn should be based on the number of members on board at the time and the percentage of hours completed. Bi-annually, in some cases quarterly, and at closeout, CNCS will calculate the final amount of the award for the year or entire project period (at closeout) based on the number of successfully completed terms of service (as certified by the program) as well as the hours served that were not certified as successfully completed.

Partnership Challenge programs are awarded only member positions, but not federal funds. Therefore, Partnership Challenge programs will not draw any funds from the HHS Payment Management System.

## **XVII. BREACHES OF PERSONALLY IDENTIFIABLE INFORMATION (PII)**

All recipients and subrecipients need to be prepared for potential breaches of Personally Identifiable Information, PII. OMB defines PII as any information about an individual, including, but not limited to, education, financial transactions, medical history, and criminal or employment history and information which can be used to distinguish or trace an individual's identity, such as their name, social security number, date and place of birth, mother's maiden name, biometric records, etc., including any other personal information which is linked or linkable to an individual. All recipients and subrecipients must ensure that they have procedures in place to prepare for and respond to breaches of PII, and notify the Federal awarding agency in the event of a breach.

If your CNCS grant-funded program or project creates, collects, uses, processes, stores, maintains, disseminates, discloses, or disposes of PII within the scope of that Federal grant award, or uses or operates a Federal information system, you must establish procedures to prepare for and respond to a potential breach of PII, including notice of a breach of PII to CNCS. Grantees experiencing a breach should immediately notify CNCS' Office of Information Technology, your CNCS Program Officer, and CNCS' Office of Inspector General.

## Budget Narrative: AmeriCorps Cape Cod Program for Barnstable County

### Section I. Program Operating Costs

#### A. Personnel Expenses

Position/Title -Qty -Annual Salary -% Time	CNCS Share	Grantee Share	Total Amount
Program Coordinator: - 1 person(s) at 60258 each x 100 % usage	0	60,258	60,258
Program Specialist: - 1 person(s) at 47500 each x 100 % usage	47,500	0	47,500
Residential Program Supervisor: - 3 person(s) at 30000 each x 100 % usage	90,000	0	90,000
<b>CATEGORY Totals</b>	137,500	60,258	197,758

#### B. Personnel Fringe Benefits

Purpose -Calculation	CNCS Share	Grantee Share	Total Amount
Program Coordinator Fringes:: Medicare = Salary x 1.45%; Retirement = Salary x 19.1%; Group Ins. = \$6967; Workers Comp = Salary x 4%; Unemploy Ins. = Salary x 0.12%; Unemploy Res. = Salary x 3%	0	23,641	23,641
Program Specialist Fringes: [Medicare = Salary x 1.45%; Retirement = Salary x 19.1%; Group Ins. = \$6960; Workers Comp = Salary x 4%; Unemploy Ins. = Salary x 0.12%; Unemploy Res. = Salary x 3%]	20,104	0	20,104
Residential Supervisor Fringes: 3 positions: Medicare = Salary x 1.45%; Retirement = Salary x 19.1%; Workers Comp = Salary x 4%; Unemploy Ins. = Salary x 0.12%; Unemploy Res. = Salary x 3%] x 3(3 positions) Group Ins. = \$6,798.66 x 3 position	45,299	0	45,299
<b>CATEGORY Totals</b>	65,403	23,641	89,044

#### C. Travel

##### Staff Travel

Purpose -Calculation	CNCS Share	Grantee Share	Total Amount
Travel to CNCS-Sponsored Meetings:	0	0	0
Staff Travel Reimbursement:: 5 Staff @\$1200/year = 5 x \$100/mo x 12 mo Staff reimbursed at \$.55/mile per County written travel policy Estimated travel is 180 miles/staff member/month.	0	6,000	6,000
<b>CATEGORY Totals</b>	0	6,000	6,000

##### Member Travel

Purpose -Calculation	CNCS Share	Grantee Share	Total Amount
Member Travel Allowances: Member travel allowance is to off-set the cost for members to drive their vehicles to service sites, individual placements, events and trainings.: 26 members x \$100/mo x 11 mo; + 6 members x \$100/mo x 3 mo (these 6 members use service partner vehicles the other portion of the year) Estimated travel is 180 miles/member/mo at \$.55/mile. Flat rate stipend of \$100/mo based on estimated travel.	0	30,400	30,400
ACC Turck Fuel- 3 trucks are used for member group projects and transporting larger items for puppet shows, large tools, etc.: \$110 per vehicle/month x 3 vehicles x 11 months	0	3,630	3,630

<b>CATEGORY Totals</b>	0	34,030	34,030
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### D. Equipment

Item/Purpose -Qty -Unit Cost	CNCS Share	Grantee Share	Total Amount
<b>CATEGORY Totals</b>	0	0	0

### E. Supplies

Item -Calculation	CNCS Share	Grantee Share	Total Amount
Supplies for Residential Houses: Toilet Paper, Cleaning Supplies, Appliances, Paper Towels, First Aid, Cookware, etc.: 3 residences x \$2567/residence	0	7,701	7,701
Member Service Gear: All member service gear listed will display the National AmeriCorps logo.: 32 members x \$127.00/member [Service T-shirts (3) = \$37.00, Long Sleeve T-Shirt (2)= \$30.00, Sweatshirt = \$26.00; Polo =\$22.00; Winter Hat= \$12.00] + 10% annual service jacket replacement = 3 jackets x \$107.00	0	4,385	4,385
Disaster Preparedness and Conservation Supplies & Tools:: PPE service gear = 32 members + 3 field staff x \$148.00 (Gloves, Safety Glasses, Boots, Gear Bag, Earplugs) Service Tools = \$788.00 x 3 residences (Shovels, Loppers, Saws, Hard Hats, Rakes, Chest Waders, etc)	0	7,544	7,544
Supplies for Meetings, Trainings, Retreats, and service events.: 3 3-day/2-night retreats x \$1,200/each = \$3,600; Member Graduation= \$800; Additional meetings = \$500	0	4,900	4,900
Supplies for Member Office/ Education and Outreach Service: Office supply for Outreach and Education = paper, markers, printer ink, flip charts, paper, promotional items, brochures, art supplies, spray paint, Worm Farm, gardening supplies, etc. 32 x \$75/member, supplies for 3 signature events @ \$500/event	0	3,900	3,900
Printing Charges: Business Cards =\$150; Report to Community = \$1,000	0	1,150	1,150
<b>CATEGORY Totals</b>	0	29,580	29,580

### F. Contractual and Consultant Services

Purpose -Calculation -Daily Rate	CNCS Share	Grantee Share	Total Amount
<b>CATEGORY Totals</b>	0	0	0

### G. Training

#### Staff Training

Purpose -Calculation -Daily Rate	CNCS Share	Grantee Share	Total Amount
Staff Training in service, disaster, and environmental skills as well as program management and State Commission trainings (Leadership, Volunteer Mgmt., Conflict Resolution, etc): Staff Training and Professional Development for the 5 program staff (Program Coordinator, Program Specialists, 3 Program Supervisors). 5 Staff x 2 trainings @ \$200/training = \$2,000- Daily Rate of 200	0	2,000	2,000
<b>CATEGORY Totals</b>	0	2,000	2,000

#### Member Training

Purpose -Calculation -Daily Rate	CNCS Share	Grantee Share	Total Amount
Member Training/Professional Development: Volunteer Mgmt, Disaster Preparedness, 1st Aid, Teamwork, Conservation, Local Govt, Education, Conflict Resolution, Civic Engagement,: Chainsaw training= \$3,500; 32 members attend 13 additional trainings valued at an average of \$500/training=\$6500(including fees and professional trainers); Additional workshops/conference fees/registration:= \$50 x 32= 1,600- Daily Rate of 667	0	11,600	11,600
<b>CATEGORY Totals</b>	0	11,600	11,600

## H. Evaluation

Purpose -Calculation -Daily Rate	CNCS Share	Grantee Share	Total Amount
<b>CATEGORY Totals</b>	0	0	0

## I. Other Program Operating Costs

Purpose -Calculation	CNCS Share	Grantee Share	Total Amount
Member Housing: Costs are determined by an assessment of the rental market in Barnstable County, including rental properties and individual room rentals.: 32 Members x \$490/month x 12 months (yearly rental). *Value Added to Member Living Allowance = \$5,880/member/year	0	188,160	188,160
Utilities for 3 Member Houses: Includes oil heat, electricity, trash removal, pest control, water and sewer.: Projections are based on previous years' costs and anticipated increases: Oil-\$5,500; Electric- \$5,500; Trash-\$3,000; Sewer -\$4,000; Pest Control - \$500; Water-\$200 (32 members x\$584.38/year)	0	18,700	18,700
Telephones & Cable/Internet. Phone lines, cable and internet for 3 program residences & phone data plans for field service for 6 staff.: Projections are based on previous years' costs and anticipated increases. Residential Phone/Cable/Internet= \$3,550( 32 members x\$110.94/year) ; Staff field phone plans= \$4,150	0	7,700	7,700
FBI Background Checks/fingerprinting, CORI, SORI.: Estimated cost: Cost: \$60 per person x 37(32 members + 5 staff)	0	2,220	2,220
Recruitment & Advertising.: Charges for recruiting members and staff in newspapers, websites, job fairs, etc. 6 advertisements x \$150/ea	0	900	900
Facilities Improvement: Upkeep, maintenance and repair to member residences: Barnstable County provides a cash match of at least \$4,000 to be used for upkeep and maintenance to the members' houses throughout the service year.	0	4,000	4,000
<b>CATEGORY Totals</b>	0	221,680	221,680
<b>SECTION Totals</b>	202,903	388,789	591,692
<b>PERCENTAGE</b>	34%	66%	

## Section II. Member Costs

### A. Living Allowance

Item -# Mbrs w/ Allow -Allowance Rate -# Mbrs w/o Allow	CNCS Share	Grantee Share	Total Amount
Full Time (1700 hrs): 32 Member(s) at a rate of 6650 each Members W/O allowance 0	179,900	32,900	212,800
1-Year Half Time (900 hours): Member(s) at a rate of each Members W/O allowance	0	0	0

2-Year Half Time (1st Year): Member(s) at a rate of each Members W/O allowance	0	0	0
2-Year Half Time (2nd Year): Member(s) at a rate of each Members W/O allowance	0	0	0
Reduced Half Time (675 hrs): Member(s) at a rate of each Members W/O allowance	0	0	0
Quarter Time (450 hrs): Member(s) at a rate of each Members W/O allowance	0	0	0
Minimum Time (300 hrs): Member(s) at a rate of each Members W/O allowance	0	0	0
<b>CATEGORY Totals</b>	179,900	32,900	212,800

## B. Member Support Costs

Purpose -Calculation	CNCS Share	Grantee Share	Total Amount
FICA for Members: FICA = 1.45% of \$6,650 x 32 members. Under Section 218 of the Social Security Act, Barnstable County does not pay into FICA's Social Security Tax.	2,608	478	3,086
Worker's Compensation: 4% of \$6,650 x 32 corps members	7,196	1,316	8,512
Health Care: \$199 per month x 11 months x 11 members (40%) (This is a generous estimate of the # of members who will elect insurance based on the past 3 years. However, insurance will be offered to all 32 members and will be provided to any whom elect it.)	23,753	2,117	25,870
<b>CATEGORY Totals</b>	33,557	3,911	37,468
<b>SECTION Totals</b>	213,457	36,811	250,268
<b>PERCENTAGE</b>	85%	15%	

## Section III. Administrative/Indirect Costs

### A. Corporation Fixed Percentage

Item -Calculation	CNCS Share	Grantee Share	Total Amount
Corporation Fixed Amount: Maximum eligible grantee share = Total of Sections I (\$591,698) and Section II (\$250,268) X (0.10) = \$84,244 Estimated cost for upcoming program year is \$40,000 for grant administration and technical assistance by the Resource Development Office.	0	40,000	40,000
Commission Fixed Amount: \$416,360 x 0.0526 x .4 = \$8760	8,760	0	8,760
<b>CATEGORY Totals</b>	8,760	40,000	48,760

### B. Federally Approved Indirect Cost Rate

Calculation -Cost Type -Rate -Rate Claimed -Cost Basis	CNCS Share	Grantee Share	Total Amount
<b>CATEGORY Totals</b>	0	0	0
<b>SECTION Totals</b>	8,760	40,000	48,760
<b>PERCENTAGE</b>	18%	82%	

<b>BUDGET Totals</b>	425,120	465,600	890,720
<b>PERCENTAGE</b>	48%	52%	
<b>Total MSYs</b>	32.00		
<b>Cost/MSY</b>	13,285		

## Source of Funds

Section	Match Description	Amount	Type	Source
Source of Funds	Member housing for 19 members in 2 houses provided by the National Park Service (secured).	111,720	In Kind	Federal
	Member housing for 13 members, 1 residence provided by Barnstable County (secured).	76,440	In Kind	Federal
	Member chainsaw and GPS training provided by Cape Cod National Seashore (secured).	1,000	In Kind	Federal
	Various member trainings, First Aid & CPR, tool training, Life After AmeriCorps, tick training, etc. (secured).	4,000	In Kind	State/Local
	Program Operating costs, such as portion of member stipends, member support costs, etc. (secured).	59,000	Cash	State/Local
	Program operating costs and supplies such as office space, non-grant staff time, County vehicle usage, member travel stipend, residential supplies, safety equipment, training space, etc. provided by Barnstable County (secured).	213,440	In Kind	State/Local
<b>Total Source of Funds</b>		<b>465,600</b>		

## Wayne Jaedtke

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**From:** Paul Cullen <Paul@bostonmarineins.com>  
**Sent:** Thursday, July 27, 2017 5:53 PM  
**To:** Wayne Jaedtke  
**Subject:** RE: Country Of Barnstable Dredging Operations Renewal quotes 2017

Wayne, I forgot the Great American pollution quote is as expiring \$3,535, plus when the new dredge is added the additional premium to add her is \$1,150

Best regards  
Paul

**From:** Paul Cullen  
**Sent:** Thursday, July 27, 2017 5:45 PM  
**To:** 'Wayne Jaedtke' <wjaedtke@barnstablecounty.org>  
**Subject:** Country Of Barnstable Dredging Operations Renewal quotes 2017

Wayne, I have attached 3 quotes that I obtain. I also received a quote from CNA but it was only for 50% of the risk and could not find another carrier to take the other 50%. What I have is the incumbent RLI with the best quote and price along with terms conditions **Their Overall price including the Excess was \$69,950 Excluding TRIA ( Cost for Terrorism \$ 900 additional)** They also agreed to add additional coverage for Automatic Acquisition up to \$1,000,000 in hull value. Also included Voluntary removal of Wreck up to \$250,000 in coverage. They reduced the Hull deductibles on the smaller watercraft I also had them add coverage for Boom overload on the 1964 Link Belt Crane Again the quote is based upon the new dredge & crew being part of the schedule as of 8/19/17 . I push the underwriter to make these changes to improve upon price & conditions

I also approached Atlantic Specialty Insurance Company. I have attached their quote for your review. price was \$72,271 excluding TRIA (Cost for Terrorism \$2,122 additional)  
Approached CV Starr Marine ( Starr Indemnity Insurance Company) quote attached price was \$85,346 X TRIA (Cost for Terrorism \$2,019 additional)

I feel with the 3 of these Commercial Marine underwriters we have a spread and the price the risk all appear to be within range of each other

Please look over the quotes and when you have the chance give me a call

Best regards

Paul

**Paul M Cullen**

**Boston Marine Insurance Services LLC**

**P.O. Box 293**

**Randolph, MA. 02368**

**Phone # 781-986-5050**

**Cell # 617 -835-4199**

**Email Address [paul@bostonmarineins.com](mailto:paul@bostonmarineins.com)**

**Website: <http://bostonmarineins.com/>**

	Premium	IMU	TRIA	
<b>CMP</b>	\$ 13,693.00		\$ 685.00	
<b>Hull/P&amp;I</b>	\$ 44,505.00		\$ 799.00	
<b>Bumbershoot</b>	\$ 12,750.00		\$ 638.00	
	<b>\$ 70,948.00</b>		<b>\$ 2,122.00</b>	<b>\$ 73,070.00</b>
		RLI		
<b>Package incl Hull/P&amp;I</b>	\$ 58,100.00		\$ 750.00	
<b>Bumbershoot</b>	\$ 11,850.00		\$ 150.00	
	<b>\$ 69,950.00</b>		<b>\$ 900.00</b>	<b>\$ 70,850.00</b>
		CV Starr		
<b>CML</b>	\$ 10,000.00		\$ 250.00	
<b>Hull/P&amp;I/Equipment</b>	\$ 64,346.00		\$ 1,519.00	
<b>Bumbershoot</b>	\$ 11,000.00		\$ 275.00	
	<b>\$ 85,346.00</b>		<b>\$ 2,044.00</b>	<b>\$ 87,390.00</b>