

PRC VISTA  
Quarterly  
Report  
Instructions

Site Supervisors

# Accessing the PRC Quarterly Report

- Go to the [PRC website](#).
- Click on “VISTA Tools & Resources” in the AmeriCorps VISTA menu.
- Open the PRC Tools box.
- Under Quarterly Reports, click on Quarterly Report Log-In.
- Click on ePass Montana. Create an ePass Montana account or log in with your State Employee Account (for state agencies only).
- Notify the PRC once you have logged into the Quarterly Report System so we can assign you the appropriate role. You will not be able to access your VISTAs report until you are assigned as their supervisor.

# Site Supervisors Role

- Review your VISTA's quarterly report to ensure accuracy – you have the opportunity to return the report to the VISTA for changes if necessary.
  - Log into the Quarterly Report System and click "Review" at the top of the page.
  - On the left side of the page under Form, select the appropriate report period.
    - Q1: January-March
    - Q2: April-June
    - Q3: July-September
    - Q4: October-December
  - Under Submitted Applications, select "Submitted" then click on "Search/Filter" at the bottom of the page.
  - The page will refresh and your VISTA's report should appear under "Submitted Applications" in the main window. To start reviewing the report, click on your VISTA's name.
- You can add comments by clicking the "Add Comment" tab at the end of each response, page, and overall report.
  - Additional information regarding requirements for each report section follows.

# Returning/Approving the Report

- When you finish reviewing the report, update the report status as appropriate under the Report Comments & Status section at the bottom of the page.
  - Click "Update".
  - In the box titled "And change status to" click on the drop down menu.
  - Select "Returned" then click "Update" to return the report to the VISTA for edits if necessary.
  - Once all changes have been made, select "Approved" then click "Update" to submit the report to the PRC.
  - Once you select "Approved" the report will be locked and additional edits cannot be made.

# Quarterly Report Guidance



Additional information provided to VISTAs to guide them through the report process.



# PRC Quarterly Report Expectations

- Quarterly Report Due Dates:
  - **April 15\*** – report on Quarter 1 activities from January 1-March 31.
    - One time extension to April 29, 2016.
  - **July 15** – report on Quarter 2 activities from April 1-June 30.
  - **October 15** – report on Quarter 3 activities from July 1-September 30.
  - **January 15** – report on Quarter 4 activities from October 1-December 31.
- Minimize “I” statements
  - The report is about the VISTA project, not the organization’s work.
- Report quarter specific activities
- Report sections should stand alone
  - Do not refer to previous sections.
- Site supervisor approval
  - Shows the site supervisor has read and approves the report.
- *Missing data reflects poorly on VISTAs, host sites, and the PRC.*

# Narrative Sections

- VISTA Information
  - Name, Host Site, Location
- Project Overview
  - Hint: ask your site supervisor for a copy of the host site application submitted to the PRC.
- Assessment
  - Refers to a focused evaluation in its entirety.
  - An example of an assessment might be a 'needs assessment' developed for a grant.
- Public Relations/Education
  - Public relations is divided into 2 categories: activities developed and activities implemented.
- Partnership, Group or Board Development
  - Development, of which the VISTA either led or assisted, of a cohesive group of diverse stakeholders.
- Strategic Planning
  - Creation of an action plan that serves an end that fits with the mission of the program or organization.
- Strategic Plan Implementation
  - Marked by the execution and/or completion of a strategic plan.
- Evaluation
  - An official analysis of the outcome component of a project or the organization.

# Performance Measures - aka Data Sections

- Performance measure goals have been previously identified by your host site supervisor and are included in your VISTA Assignment Description.
- Report only the data that pertains to your project.
  - Include relative information in the narrative boxes of these sections.
- It is okay if you answer 0!
  - Make sure you enter NA in the narrative boxes of these sections.
- Since the report is editable, use a report form to track data throughout the quarter. You'll have half of the report done when the reporting period ends!
- Or use the [VISTA Impact App](#) to track data.

# Performance Measures Community Volunteers

- Number of community volunteers **recruited**.
- Number of community volunteers **managed**\*.
- Number of community volunteers **trained**.
- Number of Veterans & military family members engaged in providing services.
- Total hours of service contributed by community volunteers **recruited**.
- Total hours of service contributed by community volunteers **managed**\*.
- *\*Managing volunteers implies direct service – PM not usually selected for VISTA members.*

# Performance Measures

# Resource Development

- Total value of cash resources leveraged.
- Total value of in-kind resources leveraged.
- Purpose of the fundraiser, grant, or donation(s).
  - Who donated the money or item – fundraiser, grant, private donation?
  - What will the money or donation be used for?
  - How will the money impact your project?

# Performance Measures Organizations & Systems

- Number of successful capacity building activities.
- Number of volunteer management practices used.
- Number of new or improved services provided to clients.
- Number of community assessments completed.
- Number of new systems & business processes implemented.
- Number of technical assistance or training sessions provided to staff by the VISTA.
- Number of staff trained by the VISTA.
- Describe the activities, services, trainings, etc.

# Performance Measures

## Beneficiaries

- Number of new individuals or clients benefited.
- Number of new disadvantaged children & youth served.
- Number of new Native Americans served.
- Number of Veterans that received assistance.
- Number of Veteran's family member that received assistance.
- Number of family members of active-duty military members that received assistance.
- Number of active-duty military members that received assistance.
- Method(s) for tracking beneficiaries.

# Member Development

- In this section, report the number of hours you spent participating in development opportunities under each category.
  - *Member development refers to training activities, not the number of hours you spent working on each activity during the quarter.*
  - Include formal and informal activities like conferences, workshops, and online courses as well as coaching, mentoring, or shadowing.
  - If you received training in a category not listed, enter the hours under Other and provide details (topic, location, etc.) in the narrative box.
  - If you did not receive training in a category not listed, enter 0 under Other and NA in the narrative box.
- Do not report Member Development opportunities required by the PRC or CNCS like Pre-Service Orientation, Community Building Institute Webinar Series, or the ServeMontana Symposium.

# Summary

- This is your chance to highlight any work that you did not include in previous sections or to put together all of your work in a cohesive statement.
- You need to include information regarding your participation in National Days of Service in this section.
  - Participation in MLK Day, AmeriCorps Week, and September 11<sup>th</sup> Day of Service is required for all national service members by CNCS.
  - Optional days of service include Global Youth Service Days, Child Hunger Week, and Make a Difference Day.
- Attachments can be included in this section as well.
  - CNCS appreciates receiving news clippings/links, flyers, etc. that detail VISTA accomplishments or show how VISTA members are being recognized.
  - You may send school newsletters, articles from local media, pictures you have taken, or anything else you decide is relevant.
  - You can also send attachments in a separate email (or snail mail) to the PRC to include in the Project Progress Report to CNCS.

# Summary Example

- This quarter the VISTA strengthened and organized the Billings Out of School Time Task Force (BOOST). This included creating a membership packet, updating information regarding risky behaviors and risk and protective factors, recruiting new members, and running meetings. Recently the VISTA has been involved in planning and will execute the national afterschool rally Lights On Afterschool. BOOST is holding a youth organization public information fair and conducting a public relations campaign to raise awareness of the organization, its members, and out of school time issues. The VISTA also participated in the Read for Peace for MLK Day in January. Twenty children participated in the event the Friday before MLK Day. Read for Peace was featured on the local news.

# Review

- This is your opportunity to review your report prior to submission.
- Check for spelling and grammatical errors.
  - Spell check does not catch everything!
  - Example: form and from
- After reviewing your report, hit the Submit button to send your report to your site supervisor.
- Your site supervisor will review your report and either return it for editing or approve it which submits the report to the PRC.
- You cannot edit your report after submitting it to your supervisor unless s/he returns it for changes.

# Tips & Tricks

- Make sure you Save each section before moving on to the next.
- Do **NOT** hit “delete” while editing the report unless you want to delete the entire report.
- You can skip to sections out of order – simply click on the section you want to work on.
- Use the Tab key to advance to the next question in the section.
- If you did not do work related to one of the Narrative sections, click the “I did not do...” box.
- Hit Shift+Enter if you want to break up your narratives into paragraphs.
- Make sure each section has a green check mark next to it before submitting your report.