

Checklist for New Staff of AmeriCorps Grantees

Things You Need to Do and People You Need to Meet When Starting Your New Job

Element	Planned	Done	Where do I look or find resources?	Hints and Tips
Program Development and Management: Program Goals, Priorities, and Strategies				
<ul style="list-style-type: none"> Review Corporation for National and Community Service (CNCS) program priorities and strategic initiatives 			http://www.nationalservice.gov/about/focus_areas/index.asp	Review the strategic plan and see how and where your program(s) fit
<ul style="list-style-type: none"> Learn about the general history of National Service 			http://www.nationalservice.gov/about/role_impact/history.asp	Learn how CNCS and its programs were created and have evolved
<ul style="list-style-type: none"> Review approved prime application (State Commission's or National Parent Organization) and sub-applications (sub-grantees' or sites applications) 			http://www.nationalservice.gov/egrants/	Review all of the information included in the grant application
<ul style="list-style-type: none"> Identify critical issues to be addressed, including resources 			This will be unique for each organization and should help with prioritizing and planning	Engage Board, Staff (current and former), sites and subgrantees, and CNCS Program and Grants Officers
<ul style="list-style-type: none"> Setup accounts in eGrants and MyAmeriCorps portal 			http://www.nationalservice.gov/egrants/ https://my.americorps.gov/mp/login.do	eGrants is the electronic grant management system; and the MyAmeriCorps portal is the electronic member management system
<ul style="list-style-type: none"> Obtain training in eGrants system 			http://www.nationalservice.gov/egrants/	
<ul style="list-style-type: none"> Obtain training in My AmeriCorps 			https://my.americorps.gov/mp/login.do	
Specific to State Commissions				
<ul style="list-style-type: none"> Review State Service Plan 			Review internal program files, and visit http://www.nationalserviceresources.org/resources-specific-groups/state-commissions	CNCS statute requires every state have a state service plan to ensure all National Service and volunteer service entities within a state are aware of each other and are coordinating activities
<ul style="list-style-type: none"> Review State Commission Administrative Standards 			http://www.americorps.gov/for_organizations/management/oversight.asp	Determine when the last "Standards Review" was completed and review the information in your State Commission files to determine continued compliance
<ul style="list-style-type: none"> Review Administrative, Program Development and Training (PDAT), and Disability Placement Grant Provisions, budgets and grant awards 			http://www.americorps.gov/for_organizations/management/index.asp#provisions	Grant Provisions exist for each type of AmeriCorps grant

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<ul style="list-style-type: none"> Review performance measures, data collection plans and tools, and data reporting systems 		https://egrants.cns.gov/espan/main/login.jsp http://nationalservicerresources.org/ac-startup	These are included as part of your approved grant application
<ul style="list-style-type: none"> Learn how the AmeriCorps program is integrated into your organization and how the program fits within your organization's strategic plan 		This will be unique for each organization; talk with colleagues within your organization	This will vary program by program

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Program Development and Management: Policies and Guidance				
<ul style="list-style-type: none"> Review National Community Service Trust Act of 1990, AmeriCorps Regulations, AmeriCorps Grant Provisions, and AmeriCorps State and National FAQs 			http://www.americorps.gov/for_organizations/management/index.asp	Review ALL information
<ul style="list-style-type: none"> Review approved grant application and budget submitted to the State Commission or National Parent Organization 			http://www.nationalservice.gov/egrants/	You will need an eGrants user name and password
<ul style="list-style-type: none"> Review position description for all staff working (in whole or in part) on grant: roles, responsibilities, and specific member guidelines 			Check all staff positions listed on approved budget or listed in application narrative	If you do not have position descriptions for each position, put them on your “to do list”; check the Resource Center for samples
<ul style="list-style-type: none"> Review internal program policies and procedures and/or AmeriCorps program handbook 			Check your grant files, and also consult with your program contact at the State Commission or National Parent Organization	Most State Commissions and National Parent Organizations have these tools; if these tools are not available, have not been developed, or you have questions, contact your CNCS Program Officer
<ul style="list-style-type: none"> Review subgrantees’ policies 			Could be in written or electronic format; could be outlined in subgrantee memos of agreement, if they exist	Most programs have these tools; if these tools are not available, have not been developed, or you have questions, contact your CNCS Program Officer or check the Resource Center for samples
<ul style="list-style-type: none"> Review other AmeriCorps program related guidance 			http://www.americorps.gov/for_organizations/management/index.asp	Review the “Communications Center,” and “Other Resources” on this website resources
<ul style="list-style-type: none"> Review program calendar 			Grantees should create a calendar that includes all relevant deadlines (internal and external)	Most programs have these tools; if these tools are not available, have not been developed, or you have questions, contact your CNCS Program Officer or check the Resource Center for samples
<ul style="list-style-type: none"> Review Application(s), Notice(s) of Funding Opportunity (NOFO) deadlines 			Check with your CNCS Program Officer, State Commission, or National Parent Organization, visit http://www.nationalservice.gov/for_organizations/funding/index.asp	The requirements for submission and deadlines vary

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Financial and Grants Management				
<ul style="list-style-type: none"> Review National Community Service Trust Act of 1990, AmeriCorps Regulations, AmeriCorps Grant Provisions, and AmeriCorps State and National FAQs 			http://www.americorps.gov/for_organizations/manage/index.asp	Review ALL information at this website; this element is intentionally duplicated in this Financial and Grants Management section because it is critical for both program <u>and</u> fiscal staff
<ul style="list-style-type: none"> Review grant funding periods (grant period, budget period, and member enrollment period) 			Review your grant files, and http://www.nationalservice.gov/egrants/ ; and State Commission or National Parent Organization specific database	The Notice of Grant Award provides these specific dates
<ul style="list-style-type: none"> Review approved budget and become familiar with narrative 			Review your grant files, and http://www.nationalservice.gov/egrants/ ; and State Commission or National Parent Organization specific database	Work with your CNCS Program and Grants Officers to make amendments, if necessary; prior approval is needed for many program and budget changes
<ul style="list-style-type: none"> Review actual to budgeted expenses, and review the process for how expenses are tracked 			Consult with your Accounting Department for internal reviews, and view information at http://www.nationalservice.gov/egrants/	Your Chart of Accounts must correlate to the approved grant budget expense line items
<ul style="list-style-type: none"> Review grant closeout requirements, schedule, and process 			Review your organization's internal policies, and review requirements at http://www.americorps.gov/for_organizations/manage/index.asp#closeout%20documents	Grants are generally granted for a 3-year period and you must closeout and submit required documents 90 days after the end of a grant period
<ul style="list-style-type: none"> Review financial reports, history, and requirements 			Review your organization's internal documents and review information at http://www.nationalservice.gov/egrants/	Requirements exist for both internal and external reports
<ul style="list-style-type: none"> Review drawdown of grant funds procedures 			Consult with your Accounting Department for policies and procedures; and review information at http://www.dpm.psc.gov/	Grant funds can be drawn down for immediate cash needs only; CNCS contracts with the U.S. Department of Health & Human Services to process payments of grant funds
<ul style="list-style-type: none"> Review matching fund sources and match raised to date 			Consult with your Accounting Department; and review the approved grant application for identified match sources	Review committed funds not yet received and confirm commitments

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<ul style="list-style-type: none"> Review Federal Financial Report (FFR) processes and deadlines 			Grantees are required to submit the FFR in based on actual expenditures; electronic submission is made at http://www.nationalservice.gov/egrants/	The FFR is the required financial report to submit to CNCS via eGrants
<ul style="list-style-type: none"> Review the FFR Cash Transaction Report, process, and deadlines 			Consult with your Accounting Department for policies and procedures; and review information at http://www.dpm.psc.gov/	CNCS contracts with the U.S. Department of Health & Human Services to collect this report
<ul style="list-style-type: none"> Review subgrantee/site invoicing and reimbursement processes and deadlines 			Review your organization's internal documents	These documents vary depending on the prime grantee; if these tools are not available, have not been developed, or you have questions, contact your CNCS Program Officer or check the Resource Center
<ul style="list-style-type: none"> Identify reporting requirements and deadlines 			Consult with your Program Officer and check grant documents	Timely reporting is essential for compliance
<ul style="list-style-type: none"> Understand organization's policies and procedures 			Consult with your Accounting Department and review written policies and procedures; review the list of required policies at the Resource Center http://www.nationalserviceresources.org/files/P-11_Internal_-_HO1_Policies_and_Procedures_11-15-10.pdf	List of required policies is based on CNCS and Office of Management and Budget regulations
Specific to National Programs				
<ul style="list-style-type: none"> Understand policies, procedures, and issues related to member living allowances 			CNCS regulations and Grant Provisions specify member living allowance guidelines: http://www.americorps.gov/for_organizations/management/index.asp#provisions	If your organization operates and AmeriCorps program in more than one state, know each state's requirements related to member living allowances

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Member Development and Support				
<ul style="list-style-type: none"> Review member recruitment, selection, retention, and management tools 			http://nationalserviceresources.org/ac-startup http://encorps.nationalserviceresources.org	Review the “Laying the Foundation: Member Development Plan” at the Resource Center
<ul style="list-style-type: none"> Learn about AmeriCorps members’ allowable activities, eligibility, benefits, supervision, recruiting, and management 			http://www.americorps.gov/for_organizations/manage/index.asp#provisions	Find information on member recruitment and development at http://encorps.nationalserviceresources.org
<ul style="list-style-type: none"> Become familiar with member file requirements 			Review program’s tools and documents related to member file management	Review other resources at http://encorps.nationalserviceresources.org/checklists_for_member_files.php
<ul style="list-style-type: none"> Become familiar with AmeriCorps member orientation and training plan 			Review program’s policies and tools, and review http://www.nationalserviceresources.org/member-training	Review other resources at http://www.nationalserviceresources.org/member-training
<ul style="list-style-type: none"> Review requirements for criminal history checks 			Review program’s policies and current information: http://www.nationalservice.gov/for_organizations/manage/history_checks.asp	
<ul style="list-style-type: none"> Review AmeriCorps member evaluation requirements 			Review program policies, tools, and documents	Review other resources at http://encorps.nationalserviceresources.org/monitoring_and_evaluating_memb.php
Specific to National Programs				
<ul style="list-style-type: none"> Become familiar with AmeriCorps member benefits 			http://www.americorps.gov/for_organizations/manage/index.asp	The Grant Provisions specify requirements; however, some programs have additional benefits for members which can vary; review budget for projected expenses
<ul style="list-style-type: none"> Review systems, and tools to monitor and evaluate member and project activities 			Review program’s policies and tools	Review other resources at http://www.nationalserviceresources.org/member-training

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Program Development and Management: Staff Supervision and Management				
<ul style="list-style-type: none"> Review staff position descriptions, roles, and responsibilities 			Check all positions listed on budget or discussed in application narrative http://nationalserviceresources.org/ac-startup	If you do not have position descriptions for each position, put them on your “to do list”; check the Resource Center for samples
<ul style="list-style-type: none"> Review human resource policies 			Consult with your Human Resources Department	
<ul style="list-style-type: none"> Review staff support and training systems 			Consult with your Human Resources Department	Create and/or review a plan for each staff
<ul style="list-style-type: none"> Review staff promotion policies 			Consult with your Human Resources Department	This must be consistent throughout your entire organization and not be different for AmeriCorps only
<ul style="list-style-type: none"> Review staff evaluation processes and tools 			Consult with your Human Resources Department	Review staff’s past evaluations and the tool used to evaluate staff
<ul style="list-style-type: none"> Cross train with staff 			Use employee work plans to learn other job tasks	
Specific to State Commission Executive Directors				
<ul style="list-style-type: none"> Review Commissioner roles, strengths and responsibilities 			Internal list, review bios and have meetings with each	There may be unfilled vacancies
<ul style="list-style-type: none"> Review Commissioner appointment process 			Internal process, check by-laws	These vary from Commission to Commission
<ul style="list-style-type: none"> Meet Commissioners and board members 			Internal list	Individual meetings, conference calls or at next meeting
<ul style="list-style-type: none"> Review opportunities and strengths of where the State Commission is positioned within the state government 			This will depend on which level the State Commission is located within the state government	State Commissions are housed in various state agencies with some as independent, non-profit organizations
<ul style="list-style-type: none"> Review the history of the State Commission and past highlights 			Review strategic plans, state service plans, and State Commission meeting minutes	

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Community and Site Partnerships				
<ul style="list-style-type: none"> Meet CNCS staff: Program/Grants/Training/Trust Officers 			Review Notice of Grant Award for contacts: http://www.nationalservice.gov/egrants/	Introductions and getting to know these contacts are key to grant compliance
<ul style="list-style-type: none"> Meet key state and local government contacts 			Review internal database or list	Knowing the history, individuals, and partnerships is helpful to set context; understand cultural issues if programs are located out-of-state
<ul style="list-style-type: none"> Meet peer organizations and potential coaches 			Consult with your CNCS Program Officer for suggestions; and review the list of other National Service programs in your area at http://www.nationalservice.gov	Consider connecting with other National Service partners, Senior Corps or Learn and Serve America programs, and other AmeriCorps programs. State Commissions, or National Parent Organizations
<ul style="list-style-type: none"> Meet with existing program partners/partnerships and review contracts or Memorandums of Understanding 			Internal database or list	Review information about the history, individuals, and partnerships, and compliance requirements
<ul style="list-style-type: none"> Review status and outcomes of previous sub-grantee/site meetings and identify items for review and follow-up 			Internal records and meeting minutes	This will provide information on the past and will identify necessary follow-up
<ul style="list-style-type: none"> Meet media relations and key contacts 			Internal database or list	Review information about the history, individuals, and partnerships to set context; this can be key for outreach and education purposes
<ul style="list-style-type: none"> Learn political culture within state and local government area and key contacts 			Internal database or list	Review information about the history, individuals, and partnerships to set context; this can be key for outreach and education purposes
<ul style="list-style-type: none"> Review subgrantee/site project status 			Internal evaluation data	The programs report this evaluation data annually but it should be tracked monthly or quarterly
<ul style="list-style-type: none"> Review subgrantee/site and program activity, monitoring, evaluation strategy, and expectations 			Review contracts or agreements and cross reference with Grant Provisions and regulations	Expectations should be clear and meet all regulations and reporting requirements
<ul style="list-style-type: none"> Review site visit strategies: purpose, focus, schedule, and tools 			Review for compliance, as well as provide assistance and identify training and technical assistance needs	A risk-based monitoring strategy will assist in efficient use of resources
<ul style="list-style-type: none"> Review opportunities for training and support for subgrantees/sites 			Consult with your CNCS Program Officer or Training Officer for ideas	The Resource Center is a good start

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• Meet subgrantees/sites staff			Conduct face-to-face meetings, conference calls, and Program Directors meetings and trainings	
• Meet AmeriCorps members			Consult internal lists by program	Attend meetings at sites, member graduations, observe member service projects, invite members to Commission/Board meetings
Specific to State Commission				
• Reach out to the National Parent Organizations and the National Sites in your state			Locate AmeriCorps programs by state at http://www.americorps.gov/about/role_impact/state_profiles.asp	Even if National Parent Organizations may not be in your state, there may be a site that operates in your state
Specific to National Programs				
• Reach out to the State Commission in your state and tell your sites to reach out to the State Commissions where they operate			Locate State Commission by state at http://www.nationalservice.gov/about/contact/statecommission.asp	State Commissions provide trainings and events that can connect your program staff and AmeriCorps members to National Service opportunities

Resources	
• Corporation for National and Community Service (CNCS) – This is the Federal government agency that provides funding to AmeriCorps programs	http://www.nationalservice.gov/
• eGrants – This is the CNCS web-based system for submitting and tracking grant applications; negotiating and awarding grants; managing grants, including processing amendments, and continuations; creating, submitting and editing recruitment listings; selecting applicants and searching for applicants; and financial and progress reporting	http://www.nationalservice.gov/egrants/
• MyAmeriCorps portal – This resource is designed to help AmeriCorps program staff, applicants, members, and alums to perform functions using different interfaces that are linked, thereby improving access to live data and critical information; members can access their Education Awards	https://my.americorps.gov/mp/login.do
• EnCorps – This website is devised as a resource to support member recruitment and development	http://encorps.nationalserviceresources.org/
• AmeriCorps Connect – This website is designed as a resource for AmeriCorps State and National Resources, Service Projects, Member Management, Staff Resources and Training, Financial Management, CNCS News, Communications Center, and AmeriCorps Social Networks	http://www.americorpsconnect.org/
• Resource Center – This is a source for tools and training for volunteer and service programs, including Service Activities; Volunteer, Member, and Staff Management; Program, Financial, and Grant Management; and Resources for Service Organizations	http://www.nationalserviceresources.org/