















*TOOLS*  
*for*  
*SUCCESS*



## *Things To Do Checklist*

YOU HAVE BEEN NOTIFIED BY CNCS, WHAT NOW?	
	<p>Review the letter, e-mail or notes from phone call carefully.</p> <ul style="list-style-type: none"> <li>• Ask questions—many questions—if you don't get answers or you don't understand answers...ask again.</li> <li>• Get answers in writing to ensure that all parties have the same information.</li> </ul>
	<p>Find out from your Program Officer:</p> <ul style="list-style-type: none"> <li>• What does it mean to be in negotiation?</li> <li>• Is there a plan?</li> <li>• Who manages it?</li> </ul>
	<p>Find out what the timeline is from CNCS to get your grant, to receive funding. That means the ability to draw down funds to your account.</p>
	<p>Continue checking or keeping informed with your stakeholders or people involved with the planning committee/work group.</p>
	<p>Make sure your financial department is on point with carrying out the grant responsibilities. Read the AmeriCorps Grant Provisions.</p>
	<p>If you are an independent AmeriCorps program inform all stakeholders that you have received the AmeriCorps grant. If you are a parent organization/or multi-site, inform them of the process. Set in measures to ensure everyone is informed.</p>
	<p>Begin to put together a 3-6 month work plan to execute starting your program.</p> <ul style="list-style-type: none"> <li>• Put together a recruitment plan.</li> <li>• Secure enough funding to start your program—this funding should not include CNCS money—to be blunt this should be money in hand.</li> <li>• Hire your staff/or train staff members about the initial start-up plan.</li> </ul>
	<p>What are the benchmarks? Identify them—make sure everyone responsible for executing them is on the same page.</p>
	<p>Begin to create a training plan for the site supervisors. Bring them together for a preliminary meeting.</p> <p>In that meeting discussion working relationships, roles, and responsibilities.</p> <ul style="list-style-type: none"> <li>• Discuss expectations.</li> <li>• Discuss preliminary service description (job descriptions for AmeriCorps members.</li> <li>• Required paperwork, deadlines, and expectations for submission.</li> <li>• Management systems</li> <li>• Design preliminary Service Site Agreement.</li> </ul>
	<p>Email, call to check-in with your assigned program officer. Share concerns, improvements, and progress. Make sure you know the timeline and the expectations.</p>
	<p>Start planning your pre-service orientation for AmeriCorps members.</p>
	<p>Identify recruitment areas and start recruiting make sure interviewees are aware of the timeline.</p>

## *Checklist for Volunteer Management*

Rating *	Indicator	Met	Needs Work	N/A
Indicators ratings: E=essential; R=recommended; A=additional to strengthen organizational activities				
E	1. The organization has a clearly defined purpose of the role that volunteers have within the organization.			
E	2. Job descriptions exist for all volunteer positions in the organization.			
R	3. The organization has a well-defined and communicated volunteer management plan that includes a recruitment policy, description of all volunteer jobs, an application and interview process, possible stipend and reimbursement policies, statement of which staff has supervisory responsibilities over what volunteers, and any other volunteer personnel policy information.			
E	4. The organization follows a recruitment policy that does not discriminate, but respects, encourages and represents the diversity of the community.			
E	5. The organization provides appropriate training and orientation to the agency to assist the volunteer in the performance of their volunteer activities. Volunteers are offered training with staff in such areas as cultural sensitivity.			
R	6. The organization is respectful of the volunteer's abilities and time commitment and has various job duties to meet these needs. Jobs should not be given to volunteers simply because the jobs are considered inferior for paid staff.			
R	7. The organization does volunteer performance appraisals periodically and communicates to the volunteers how well they are doing, or where additional attention is needed. At the same time, volunteers are requested to review and evaluate their involvement in the organization and the people they work with and suggest areas for improvement.			
R	8. The organization does some type of volunteer recognition or commendation periodically and staff continuously demonstrates their appreciation towards the volunteers and their efforts.			
A	9. The organization has a process for reviewing and responding to ideas, suggestions, comments and perceptions from volunteers.			
A	10. The organization provides opportunities for program participants to volunteer.			
A	11. The organization maintains contemporaneous records documenting volunteer time in program allocations. Financial records can be maintained for the volunteer time spent on programs and recorded as in-kind contributions.			

*Source: United Way of Minneapolis Area.*

## ***Volunteer Management Plan***

*Many elements of your planning for members can be applied to your planning for volunteers. Ask yourself the following questions. Your answers to these questions will determine the role volunteers will play in your organization and form the basis for your plan.*

- What types of skills do you want your volunteers to have? (Tutoring, construction, nursing, marketing, etc.)
- What types of volunteers do you need? One-time (for a one-day service project), episodic (every once in a while), long-term, professional (skilled nurses, engineers, etc.), or a combination of these types?
- How and where will you recruit to ensure you get the volunteers that you need?
- What criteria and process will you use for screening and selecting volunteers?
- What training will the volunteers need and who will conduct it?
- What level of support is needed?
- Given the tasks you plan to assign to the volunteers, what level of supervision will be needed?
- What staff member will be responsible for the volunteers? What percentage of his/her time will be dedicated to managing the volunteers?
- What role will your AmeriCorps members play in the recruitment and management of volunteers? Some or all of your AmeriCorps members can take much of the responsibility from staff regarding volunteers, assuming this responsibility is reflected in the members' position descriptions. AmeriCorps members may:
  - Recruit, train and coordinate volunteers;
  - Develop an effective volunteer management system (volunteer position descriptions, screening techniques, volunteer policy and procedure manuals); and
  - Provide ongoing support to volunteers to ensure that they have a high quality experience and continue to serve.
- Given your answers to the questions above, how many volunteers can your organization manage?