

# Continuity Planning Transition Summary

Tool created by AmeriCorps State and National Program Officers

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## Introduction

The purpose of this outline is to assist AmeriCorps State and National grantees with their efforts to ensure program continuity during times of temporary and permanent staff transitions. This Transition Summary is an example and is not inclusive of all the categories of information that an organization may choose to provide in a transition document. It serves as a starting point for AmeriCorps commission, national direct, and Tribal grantee staff to develop and formalize their transition processes. The document is intentionally broad in nature and should be tailored by type, size, and complexity of each organization. In addition, it can also be tailored by staff position within each organization if you choose to create a separate document for each staff role. The main takeaway from this resource is the need for each grantee to have a Transition Summary to help new staff navigate their new role(s) and responsibilities.

## Outline

### 1. Key Contacts and Relationships

- Up-to-date list of key internal and external stakeholders (funders, board members, staff members, partner organizations, key collaborations, membership groups, vendors, etc.).
- Communication plan on who should be contacted during a transition, including when and why.



## 2. Timeline/Calendar

- A calendar of events and anticipated activities (internal and external) for the upcoming 12-18 months.



## 3. Technology

- Links to and descriptions of various technology platforms used by your organization and log-in information or instructions for creating an account.



**4. AmeriCorps Grant Funding Summary/Financial Information**

- Include grant #s, funding amounts, grant period, reporting deadlines, etc.
  - For Commissions, include all prime and subgrantee information.
- Links to grant materials for each grant (application, budget, notice of grant award, terms and conditions, performance measures, GPRs, and FFRs submitted to date, etc.) or instructions on where to locate this information.

**5. “Playbooks”/Outline of Written Policies and Procedures**

- Include a list and brief summaries of written policies and procedures for all key elements of grant implementation to ensure that new staff are able to navigate this information in your files.

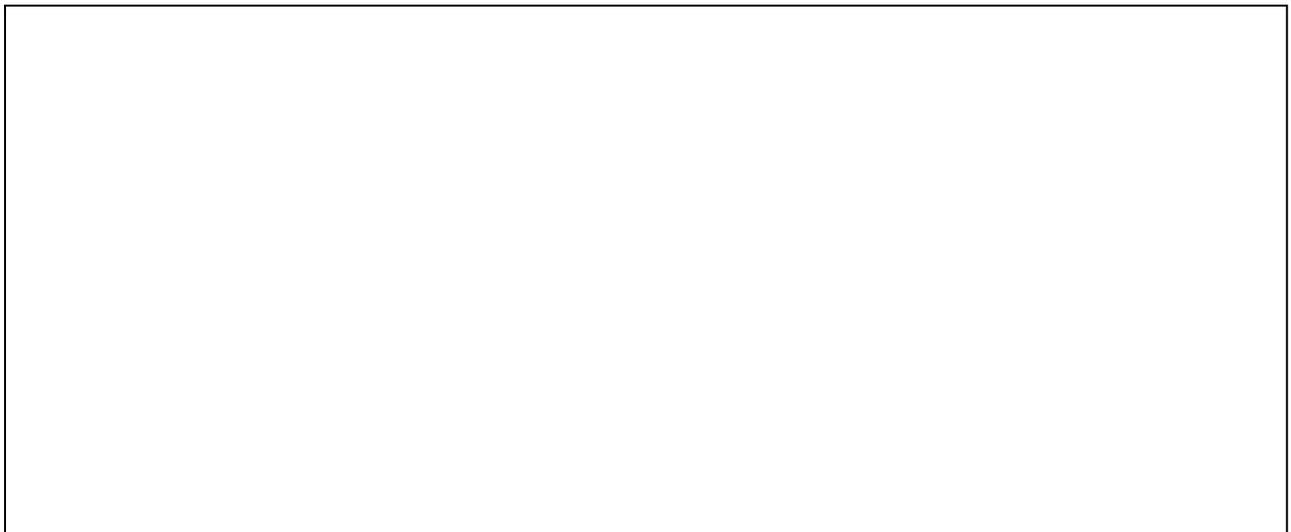
**6. Performance Measurement/Reporting**

- Outline of organization’s performance reporting requirements and processes, including when and how information is collected for each grant and how it is reported to CNCS and other funders.



**7. Member Management/Support**

- A detailed outline of the processes related to member management and support, such as member recruitment, training, enrollment, supervision, criminal history checks, file keeping, evaluations, exit, etc.



## 8. Key Tasks and Assignments

- List pending urgent tasks to be completed within, for example, 1 week, 1 month, 3 month, etc., including deadlines and links to relevant guidance for completing the tasks.

## 9. Transition Resources

- Links to relevant AmeriCorps Grant Requirement documents:

- Managing AmeriCorps Grants Site

<http://www.nationalservice.gov/build-your-capacity/grants/managing-ameri-corps-grants>

- The National and Community Service Act of 1990 as amended by the Serve America Act
  - AmeriCorps Regulations (45 CFR)
  - Notices of Funding Opportunity (NOFOs)
  - AmeriCorps State & National Frequently Asked Questions
  - AmeriCorps Grant Terms and Conditions
  - The Knowledge Networks
- Organization's internal onboarding materials
  - Other relevant resources

- Provide names and contact information for whom new staff can contact in case of challenges or questions with various tasks

**10. Lessons Learned**

- Describe any lessons learned that would be relevant for new staff.

**11. Additional Materials/Documents** (examples to attach)

- Organization's strategic plan
- Clearly identified organizational chart with lines of authority and responsibilities designated
- Operations manuals for key administrative systems
- Copies of current budgets, financial statements and audits
- Staff roster and contact information for all employees
- Staff job descriptions, including tasks, responsibilities, deliverables, and work plans