AmeriCorps Staff Development
March 29, 2018

Continuity Planning
Welcome!
AmeriCorps Staff Development

We’ll get started in just a couple of minutes.

Please be sure to access the Audio link in Adobe Connect.
Technology Check

• Welcome to Adobe Connect!

• Today’s presentation is being recorded, and it will be posted on the Knowledge Network in April:
  www.nationalservice.gov/resources/americorps

• We will use the Chat box throughout today’s presentation. Let’s test the Chat feature; please type a short greeting to your colleagues now.
Purpose of the Staff Development Webinars

• In general, the 2018 AmeriCorps Staff Development Series is designed to build knowledge in core program and grant management areas to support strong service across the network.

• The webinars are intended to give commission and program staff a break from the day-to-day demands of grant management and focus on broader, longer-term issues.
AmeriCorps Staff Development Series

The 2018 webinar series includes:

- Continuity Planning
- How to Review Data Plans
- Orientations for New Commission and Program Staff
- Financial Management
- Criminal History Check Management
- AmeriCorps Member Orientation and Training
- Member and Site Monitoring and Reporting Requirements
- Submitting Grantee Progress Reports
- Data Quality Monitoring
Who is on the webinar today?

• Please take a minute to answer these poll questions:
  – Which best describes your organization’s relationship with CNCS?
  – What is your role in the organization?
  – How long have you worked with CNCS grants?
Target Audiences for Today’s Session

• AmeriCorps State and National Prime Grantees:
  • State Service Commissions
  • Tribal programs
  • National/multi-state programs
What are we doing today?

- During today’s webinar, we will focus on a very common organizational need within the AmeriCorps network: the need for strong and consistent staff transitions in commissions and programs.
CNCS Staff Presenters

Margaret Mattinson
AmeriCorps State and National Program Officer
mmattinson@cns.gov

Britney Tonning
AmeriCorps State and National Program Officer
btonning@cns.gov
Today’s Session
Today’s Agenda

• Introduction

• 10 Elements of Program Continuity Planning

• Experience from the Field

• Activity

• Q&A

• Closing Remarks
10 Elements of Continuity Planning

- Timeline/Calendar
- Funding
- “Playbooks”
- Staff Engagement
- Technology
- Recordkeeping
- Performance Measurement/Reporting
- Member Management/Support
- Contacts/Relationships
- Resources
10 Elements of Program Continuity Planning

- **Timeline/Calendar**
  Manage a calendar that incorporates CNCS, organizational, program, and subgrantee level timelines.

- **Funding**
  Keep records of types, amounts, and sources of program funding, as well as grant end dates, spending status, and how the budgets are managed at your organization.

- **Playbooks**
  Maintain written policies and procedures on all program management aspects and AmeriCorps requirements. Develop transition materials for new staff.

- **Staff Engagement**
  Develop program management in which operational knowledge is shared by multiple staff, leadership is engaged at multiple levels, and financial and program staff cooperate.

- **Technology**
  Prepare information on technology used in program management – how to access and use it and where to go for help.

- **Record-keeping**
  Maintain complete and compliant records. Provide new staff with access to program files and educate them about record-keeping procedures and requirements.

- **Performance Measurement & Reporting**
  Prepare clear guidance on your performance measurement and data collection processes and instruments and how they are used for reporting.

- **Member Management Support**
  Outline member management processes – recruitment, enrollment/exit deadlines, service sites, training, timekeeping and payroll, supervision, pending grievances, alumni engagement, etc.

- **Contacts/Relationships**
  List and describe contacts and functions of key stakeholders, such as board members, partners, funders, subgrantees, site directors/member supervisors, media, etc.

- **Resources**
  Outline external support available to your program(s) during transition, such as AmeriCorps regulations and guidance, CNCS staff, peers, grantee groups, etc.
Timeline/Calendar

• CNCS deadlines

• Organization
  – Program(s)
  – Subgrantee(s)

• Days of Service

• Non-CNCS activities
Timeline/Calendar Questions

• What programs or strategies do you use to manage and track your calendars?

Please take a minute to type your answers in the Chat box.
$/Funding

- Number and types of grants
- Funding level
- Match requirement
- Sources
- Budget period
- Budgeted/actuals
- Finance staff
- Local criteria
$/Funding Questions

- Please provide additional examples of fiscal elements you might want to record for future staff.

*Please take a minute to type your answers in the Chat box.*
“Playbooks”

- Grant application(s) and Terms & Conditions
- Policies and procedures manual and written guidance
- Specific local processes
- Transition document
• What playbooks could programs develop for their own continuity planning?

*Please take a minute to type your answer in the Chat box.*
Experience from the Field

• Best Practices for Staff Transition Planning

• Lessons Learned
New Jersey Commission’s
CONTINUITY PLANNING
Overview
March 29, 2018
About New Jersey...

NATIONAL SERVICE IN NEW JERSEY

869 local service sites

6,266 Senior Corps & AmeriCorps members

$28.6 million CNCS and local funding

$76.3 million AmeriCorps scholarships earned since 1994

NationalService.gov/New-Jersey
Staff Transition Planning...

1. Mentor/Mentee Partnership
2. In-Person Orientation Plan
3. Collaboration/Communication
1. Mentor/Mentee Partnership...

- Guidelines and recommendations provided
- Surveys administered at year end
- “Certificate of Appreciation” to Mentor
2. In-Person Orientation...

- AmeriCorps 101
- Data Systems Overview
- Program Manager Handbook
3. Collaboration/Communication

- Best Practices Sharing
- Recruitment/Retention Team Created
- Monthly Individual Conference Calls
To remediate risk during a staff transition, we developed the following:
- Mentor/Mentee Partnership
- In-Person Orientation
- Collaboration Environment with Increased Communication

Because our goal is 100% compliance for both staff and members, we have just created a Compliance Unit to focus on all areas including rules and regulations, monitoring, and criminal history checks.
Questions or Comments?
CONTACT INFORMATION

New Jersey Commission
National & Community Services
NJ Department of State
33 West State Street, 4th Floor
Trenton, New Jersey
609-633-7325

Marie Humenik, Program Officer
Marie.Humenik@sos.nj.gov
Experience from the Field

Thank you, Marie!
Activity

3 Case Studies

Let’s Practice!
Case Study # 1

Max’s file does not contain any information about his suspension.

<table>
<thead>
<tr>
<th>Calendar</th>
<th>Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Playbooks”</td>
<td>Staff Engagement</td>
</tr>
<tr>
<td>Record-keeping</td>
<td>Technology</td>
</tr>
<tr>
<td>Performance</td>
<td>Member Management</td>
</tr>
<tr>
<td>Measurement</td>
<td>Resources</td>
</tr>
<tr>
<td>Contacts &amp;</td>
<td></td>
</tr>
<tr>
<td>Relationships</td>
<td></td>
</tr>
</tbody>
</table>
Case Study # 1 Poll

• Which of the 10 Elements was not adequately addressed by the Green Leaf organization?

- Calendar
- Funding
- “Playbooks”
- Staff Engagement
- Recordkeeping
- Technology
- Performance Measurement
- Member Management
- Contacts & Relationships
- Resources
Case Study # 1 Answer

Which of the 10 Elements was not adequately addressed by the Green Leaf organization?

- Calendar
- Funding
- “Playbooks”
- Staff Engagement
- Recordkeeping
- Technology
- Performance Measurement
- Member Management
- Contacts & Relationships
- Resources
Case Study # 2

Staff members do not know how to reinstate a member.

<table>
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<tr>
<th>Calendar</th>
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<td>Record-keeping</td>
<td>Technology</td>
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<tr>
<td>Performance Measurement</td>
<td>Member Management</td>
</tr>
<tr>
<td>Contacts &amp; Relationships</td>
<td>Resources</td>
</tr>
</tbody>
</table>
Case Study # 2 Poll

- Which of the 10 Elements was not adequately addressed by the organization?
  - Calendar
  - Funding
  - “Playbooks”
  - Staff Engagement
  - Recordkeeping
  - Technology
  - Performance Measurement
  - Member Management
  - Contacts & Relationships
  - Resources
Case Study # 2 Answer

- Which of the 10 Elements was not adequately addressed by the organization?

  - Calendar
  - Funding
  - “Playbooks”
  - Staff Engagement
  - Recordkeeping
  - Technology
  - Performance Measurement
  - Member Management
  - Contacts & Relationships
  - Resources
Case Study # 3

The State Commission missed the response deadline for grant clarification.

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<th>Calendar</th>
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</thead>
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<td>“Playbooks”</td>
<td>Staff Engagement</td>
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<td>Technology</td>
</tr>
<tr>
<td>Performance Measurement</td>
<td>Member Management</td>
</tr>
<tr>
<td>Contacts &amp; Relationships</td>
<td>Resources</td>
</tr>
</tbody>
</table>
Case Study # 3 Poll

• Which of the 10 Elements was not adequately addressed in this case?
  – Calendar
  – Funding
  – “Playbooks”
  – Staff Engagement
  – Recordkeeping
  – Technology
  – Performance Measurement
  – Member Management
  – Contacts & Relationships
  – Resources
Case Study # 3 Answer

• Which of the 10 Elements was not adequately addressed in this case?
  – **Calendar**
  – Funding
  – “Playbooks”
  – Staff Engagement
  – Recordkeeping
  – Technology
  – Performance Measurement
  – Member Management
  – Contacts & Relationships
  – Resources
How to Apply Today’s Content

• Assess your organization: How ready are you for significant organizational transition?
• Prioritize your development needs.
• Here are a few tools to support your own assessment:
  o Self-Assessment
  o Continuity Planning Checklists
  o Transition Summary Outline
1. **Timeline/Calendar** - Manage a calendar that incorporates CNCS, organizational, program, and subgrantee level timelines.

   Current practices assessment: ___________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________

   Improvements: _______________________________________________________________________
   ___________________________________________________________________________________
   ___________________________________________________________________________________
   ___________________________________________________________________________________
   ___________________________________________________________________________________

2. **$/Funding** - Keep records of type, amounts, and sources of program funding, as well as grant end dates, spending status and how the budgets are managed at your organization.

   Current practices assessment: ___________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________

   Improvements: _______________________________________________________________________
   ___________________________________________________________________________________
   ___________________________________________________________________________________
   ___________________________________________________________________________________
   ___________________________________________________________________________________

3. **“Playbooks”** - Maintain written policies and procedures on all program management aspects and AmeriCorps requirements. Develop transition materials for potential new staff.

   Current practices assessment: ___________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
## Continuity Planning Checklist

### Timeline/Calendar

<table>
<thead>
<tr>
<th>Tasks/Actions</th>
<th>Position/Person Responsible</th>
<th>Date Completed</th>
<th>Date Reviewed</th>
<th>Revision Required?</th>
<th>Date Revised</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collect calendar information on CNCS, commission, and subgrantee events, activities, and deadlines</td>
<td>Susan Jackson</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Draft commission timeline for 12 months</td>
<td>Susan Jackson</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update timeline (bi-monthly)</td>
<td>Susan Jackson</td>
<td></td>
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</tbody>
</table>

...
Continuity Planning Checklists

Here is another planning checklist that may be useful for you:

![2017 Checklist for New AmeriCorps Programs and Program Staff](https://www.nationalservice.gov/sites/default/files/resource/2017-Checklist.pdf)

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

<table>
<thead>
<tr>
<th>Element</th>
<th>Planned</th>
<th>Done</th>
<th>Where do I look?</th>
<th>Hints and Tips</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Development and Management: Program Goals, Priorities, and Strategies</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Corporation for National and Community Service (CNCS) Program priorities and strategic initiatives</td>
<td></td>
<td></td>
<td><a href="https://www.nationalservice.gov/focus-areas">https://www.nationalservice.gov/focus-areas</a></td>
<td>Review the strategic plan and see how and where your program(s) fits</td>
</tr>
<tr>
<td>Learn about the general history of national service</td>
<td></td>
<td></td>
<td><a href="https://www.cnsc.gov/about/who-we-are/our-history">https://www.cnsc.gov/about/who-we-are/our-history</a></td>
<td>Learn how CNCS and its programs were created and have evolved</td>
</tr>
<tr>
<td>Identify critical issues to be addressed, including resources</td>
<td></td>
<td></td>
<td>This will be unique for each organization and should help with prioritizing and planning</td>
<td>Engage board, staff (current and former), sites and subgrantees, and CNCS staff</td>
</tr>
<tr>
<td>Review performance measures in approved grant/eGrants, and create data collection plans, tools, and data reporting systems</td>
<td></td>
<td></td>
<td><a href="https://www.nationalservice.gov/build-your-capacity/grants/eGrants">https://www.nationalservice.gov/build-your-capacity/grants/eGrants</a>; and <a href="https://www.nationalservice.gov/resources/evaluation">https://www.nationalservice.gov/resources/evaluation</a></td>
<td>These are included as part of your approved grant Application in eGrants</td>
</tr>
<tr>
<td>Learn how the AmeriCorps program is integrated into your organization and how the program fits within your organization’s strategic plan</td>
<td></td>
<td></td>
<td>This will be unique for each organization; talk with colleagues within your organization</td>
<td>Your ability to articulate this clearly will be useful as you start developing AmeriCorps member recruitment and training materials</td>
</tr>
<tr>
<td>Learn about the state commissions and national parent organizations that operate in your area</td>
<td></td>
<td></td>
<td>Locate AmeriCorps programs by state at <a href="https://www.nationalservice.gov/impact-our-nation/state-profiles">https://www.nationalservice.gov/impact-our-nation/state-profiles</a></td>
<td>Check commission and program websites and talk to your program contacts</td>
</tr>
</tbody>
</table>
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.
Additional Resources

• CNCS Website
  
  www.nationalservice.gov

• Grant Terms and Conditions
  
  www.nationalservice.gov/resources/financial-management/terms-conditions-and-certifications-assurances-cnns-grants

• National Service Knowledge Network
  
  www.nationalservice.gov/resources/americorps
What questions do you have?
Wrap Up for Today

• Please share feedback on today’s webinar. Stay on for a few minutes at the conclusion to answer 4 short questions.

• Today’s presentation will be posted on the AmeriCorps page of the National Service Knowledge Network in April:

  www.nationalservice.gov/resources/americorps
Next Staff Development Webinar

• Next AmeriCorps Staff Development Webinar:

  April 26, 3:00 – 4:30 pm Eastern

  Topic: How to Review Data Plans – For State Commissions
Thank you!