

Welcome! **New Program Staff Orientation**



***We'll get started in just
a couple of minutes.***

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



AmeriCorps Staff Development Series

June 14, 2018

Orientation for New Program Staff



Technology Check



- Check the Connect Web Links to access today's PPT and training evaluation.
- Today's presentation is being recorded, and it will be posted on the Knowledge Network in late June:
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 Collection 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

Today's Target Audience

- AmeriCorps national/multi-state and tribal program staff who are new to their jobs and/or directly involved in orienting new employees at the program

Webinar Purpose



Today's presentation is designed to:

- ✓ Provide an overview of key knowledge and skills needed by program staff to be effective AmeriCorps grant managers and CNCS partners;
- ✓ Highlight important information new program staff need in first week and first month on the job; and
- ✓ Share best practices and lessons learned.

How to use this webinar material:

- ✓ For new staff, we hope this is immediately relevant and helpful to your jobs; we hope the CNCS info is new and applicable to you now.
- ✓ For existing staff, we hope that you'll see information or training techniques that could inform your existing staff orientations.

Today's CNCS Presenters

- **Curtis Cannon**

Program Officer

AmeriCorps State and National

ccannon@cns.gov



- **Barbara Ellen Reynolds**

Senior Program and Project
Specialist

AmeriCorps State and National

breynolds@cns.gov



Today's Agenda

- Program Staff Key Knowledge and Skills
- Possible Phases of Learning for New Staff
- The CNCS Relationship
 - CNCS Year-at-a-Glance and Cycle of AmeriCorps Program Development
 - Role of the AmeriCorps Program Director
 - Role of the CNCS Program Officer
 - CNCS Organizational Culture
- Guest Speakers: Natalia Lopez and Fiorella Morales, IRC
- Resources
- Q&A and Wrap-up

National Service Partnerships



CNCS Partners:

- Share outreach, training, and technical assistance functions
- Share compliance monitoring, reporting, and evaluation
- Share charge to promote service and volunteerism

CNCS Prime Grantees:

- Manage grant implementation and compliance requirements for programs and members
- Receive prime competitive grants

What should program staff know?

As CNCS partners and grantees, program staff should:

- Know CNCS
- Know AmeriCorps
- Know your community
- Know your program
- Know your AmeriCorps members

Know CNCS



- ✓ Mission, programs, CNCS organization chart/agency structure, and names of leaders, including CNCS staff working in state field offices
- ✓ Communications and published information; national service branding guidance
- ✓ National Service Community Service Trust Act as amended by the Service America Act
- ✓ Federal budget process and what it means for grantees, members
- ✓ Rules and regulations, funding opportunities, grant application instructions, grant terms and conditions, monitoring and compliance requirements, FAQs, and on-going guidance and instructions

Know AmeriCorps

- ✓ History, mission; AmeriCorps program cycle, required support
- ✓ Best practices of program development and member support
- ✓ Where to find resources online to support program and member development
- ✓ How to support diverse programs
- ✓ How to connect to others in the state or national service network



Know Your Community

- ✓ Demographics, community needs, existing resources, and institutions (national service and volunteer networks, nonprofits, businesses, schools, universities, government agencies, religious groups, community and other associations, etc.)
- ✓ Key contacts and leaders; are there any notable AmeriCorps alumni in the community (from your program or others)?



Know Your Program



- ✓ Grant requirements and commitments made in approved program grants from CNCS
- ✓ Budgets (approved and routine reports on budgets to actuals), program financial management process, deadlines; this item may not apply to all program staff
- ✓ Program/agency board: membership status, role in program's operations and promotion of service
- ✓ Program's organizational context: is your AmeriCorps program part of a larger organization?
- ✓ History of your program: how has it evolved over the years? Who and where are your AmeriCorps program alumni overall (not just in the community)?

Know Your Program Requirements

- ✓ Theory of change and logic models as defined and required by CNCS
- ✓ Required performance measures and evaluation requirements of subgrantees
- ✓ How to implement and support all aspects of collecting and using performance data for program improvement
- ✓ The challenges, successes, and lessons learned from program grant cycle

Know Your Members

- ✓ Position descriptions
- ✓ Demographics, backgrounds, personalities
- ✓ Performance data (individual and program)
- ✓ Site details, if relevant for your program model
- ✓ Member goals and life after AmeriCorps plans
- ✓ Alumni data



What skills should program staff have?

As CNCS partners and grantees, program staff should be able to:

- Champion national service relentlessly
- Enforce rules and ensure compliance
- Strive for continuous improvement
- Provide high quality training and technical assistance (TTA)
- Communicate complex information
- Thoroughly and consistently document/keep records
- Work effectively with ambiguity

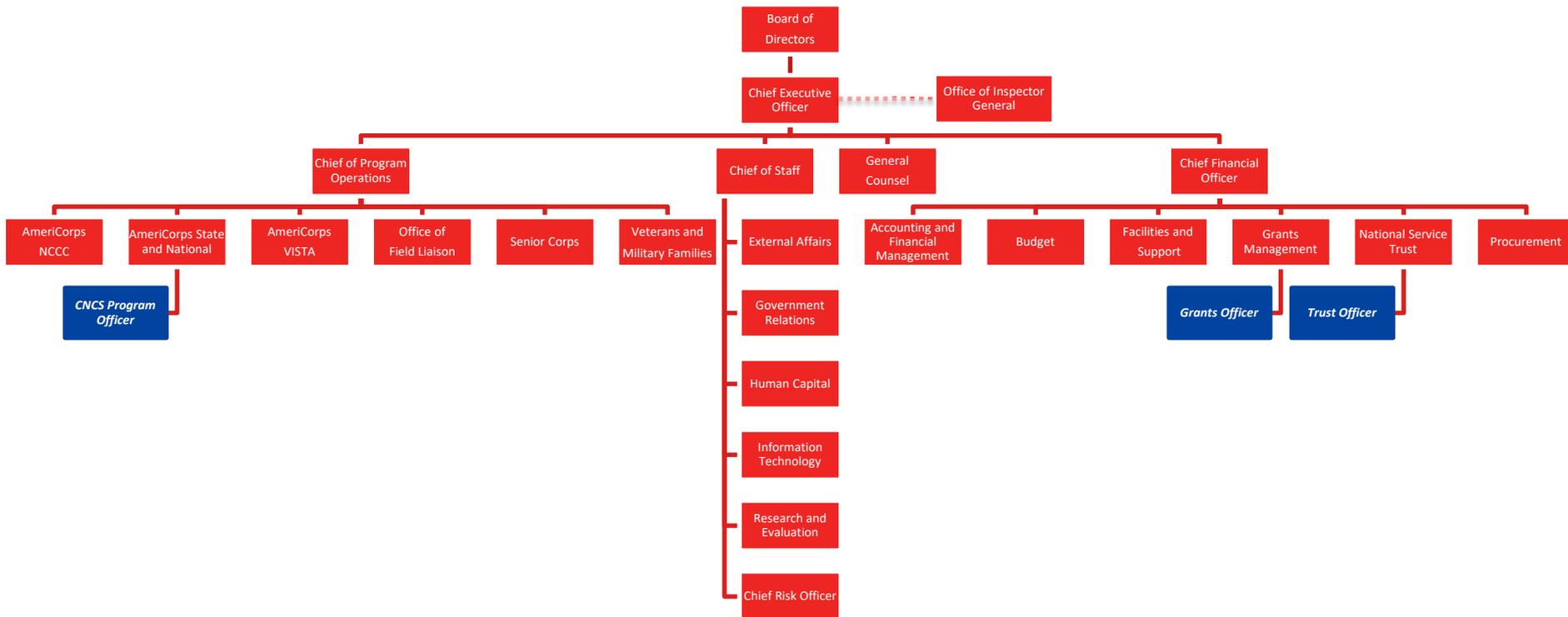
Possible Phases of Learning

- Week 1: Getting started in the AmeriWorld
 - Prohibited and unallowable activities: in general and how they apply to program staff and members
 - Staff time rules, grant allocations, and timesheet procedures
 - How to access information: PO and GO, eGrants account, CNCS and ASN email lists, www.nationalservice.gov, Knowledge Network

Possible Phases of Learning

- Month 1: Basic and introductory information about working with CNCS
 - CNCS organizational chart
 - CNCS staff contacts
 - Acronyms and terminology
 - Types of prime ASN grantees
 - Types of grants and the grant-making cycle
 - The CNCS relationship

CNCS Organizational Chart—April 2018



CNCS Staff Contacts



All prime grantees have 3 key points of contact at CNCS:

Program Officer (PO)

Grants Officer (GO)

National Service Trust
Officer

Key Terminology and Acronyms

Competitive Grant
Cycle

Formula Grant
Cycle

Notice of Funding
Opportunity (NOFO)

Grant Application
Review Process
(GARP)

Grantee Progress
Report (GPR)

Federal Financial
Report (FFR)

Prime Grantee

Subgrantee

eGrants and the
Member Portal

Types of Prime Grantees

**National Direct /
Multi-state**

**Managed by Indian
Tribes and US Territories**

**State Service
Commissions**

Types of Prime Grantees

**National Direct /
Multi-state**

**Managed by Indian
Tribes and US Territories**

**State Service
Commissions**

- Programs that have operating sites and place AmeriCorps members in service in at least 2 states
- Headquarters or parent office applies to CNCS directly for AmeriCorps funds and manages the program and grant funds in the various locations

Types of Prime Grantees

**National Direct /
Multi-state**

**Managed by Indian
Tribes and US Territories**

**State Service
Commissions**

- A federally recognized Indian Tribe, band, nation, or other organized group or community, including any Native village, Regional Corporation, Village Corporation, or a tribal organization that is controlled, sanctioned, or chartered by one of the entities mentioned earlier

Types of Prime Grantees

**National Direct /
Multi-state**

**Managed by Indian
Tribes and US Territories**

**State Service
Commissions**

- Boards of 15-25 individuals nominated and appointed by a state's governor; oversees the implementation of national and community service and volunteer initiatives in a particular state, US territory, or the District of Columbia
- Employ a small professional staff to manage the AmeriCorps grant portfolio and direct other state initiatives
- Provide funding to single-state AmeriCorps programs

Grant Cycles



Competitive

Formula

Special

Grant Cycles: Competitive

Competitive

Formula

Special

*National,
Multi-state*

Grant Cycles: Formula

Competitive

Formula

Special



State Commissions Only

Grant Cycles: Special



Competitive

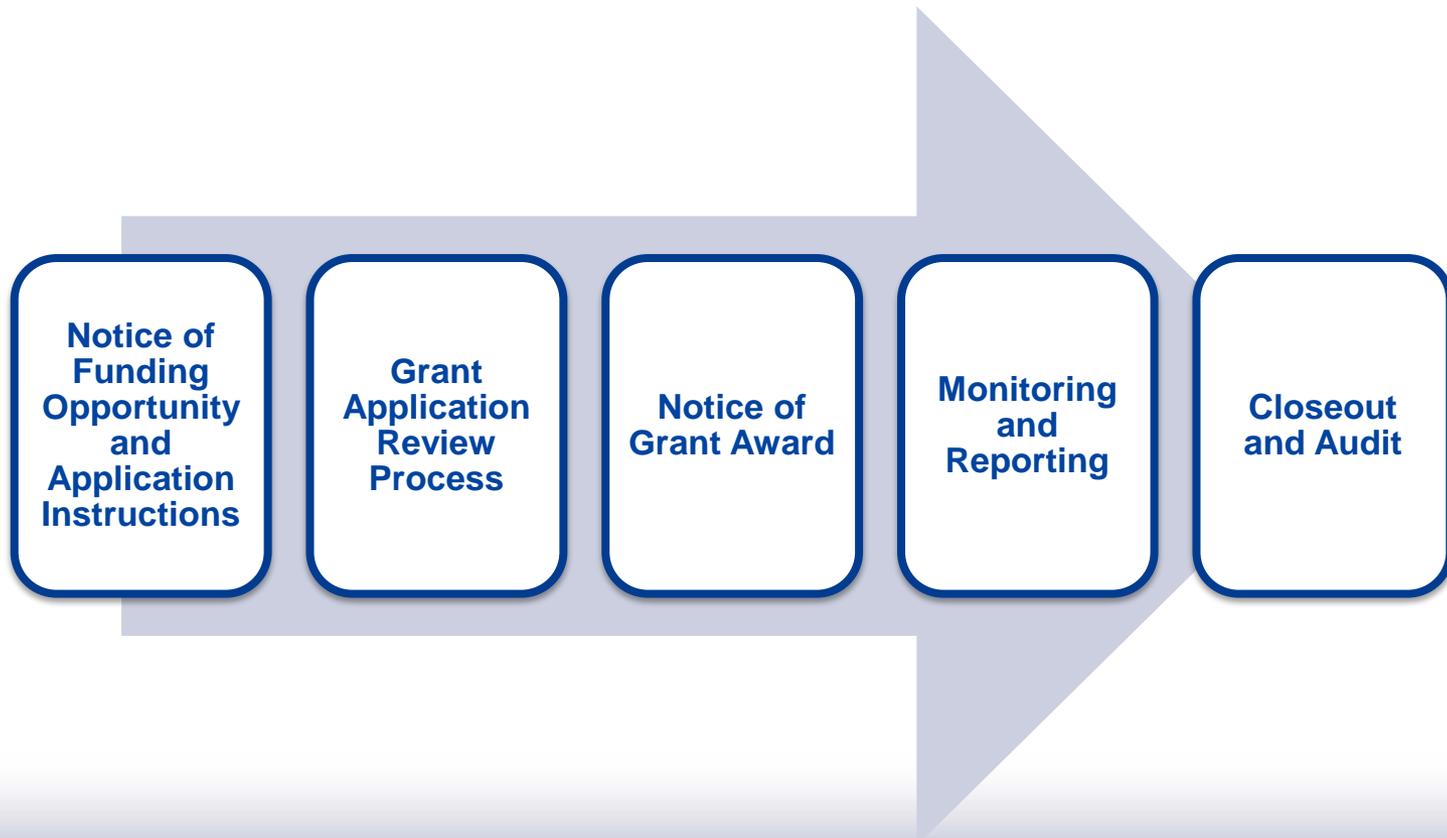
Formula

Special



*Tribes,
Targeted Priority,
Program Development*

CNCS Grant-making



The CNCS Relationship

Here are few important elements of the program and CNCS relationship:

- ✓ CNCS year-at-a-glance
- ✓ Cycle of AmeriCorps program development
 - ✓ CNCS expectations of program director
 - ✓ CNCS communications
 - ✓ Role of the CNCS Program Officer
 - ✓ CNCS agency culture

CNCS Year-at-a-Glance

Jan - Mar

- Competitive grants due
- MLK Day of Service
- AmeriCorps Week

Apr - Jun

- GPRs due
- FFRs due
- Unexpended funds report due
- Senior Corps Week
- National Volunteer Week

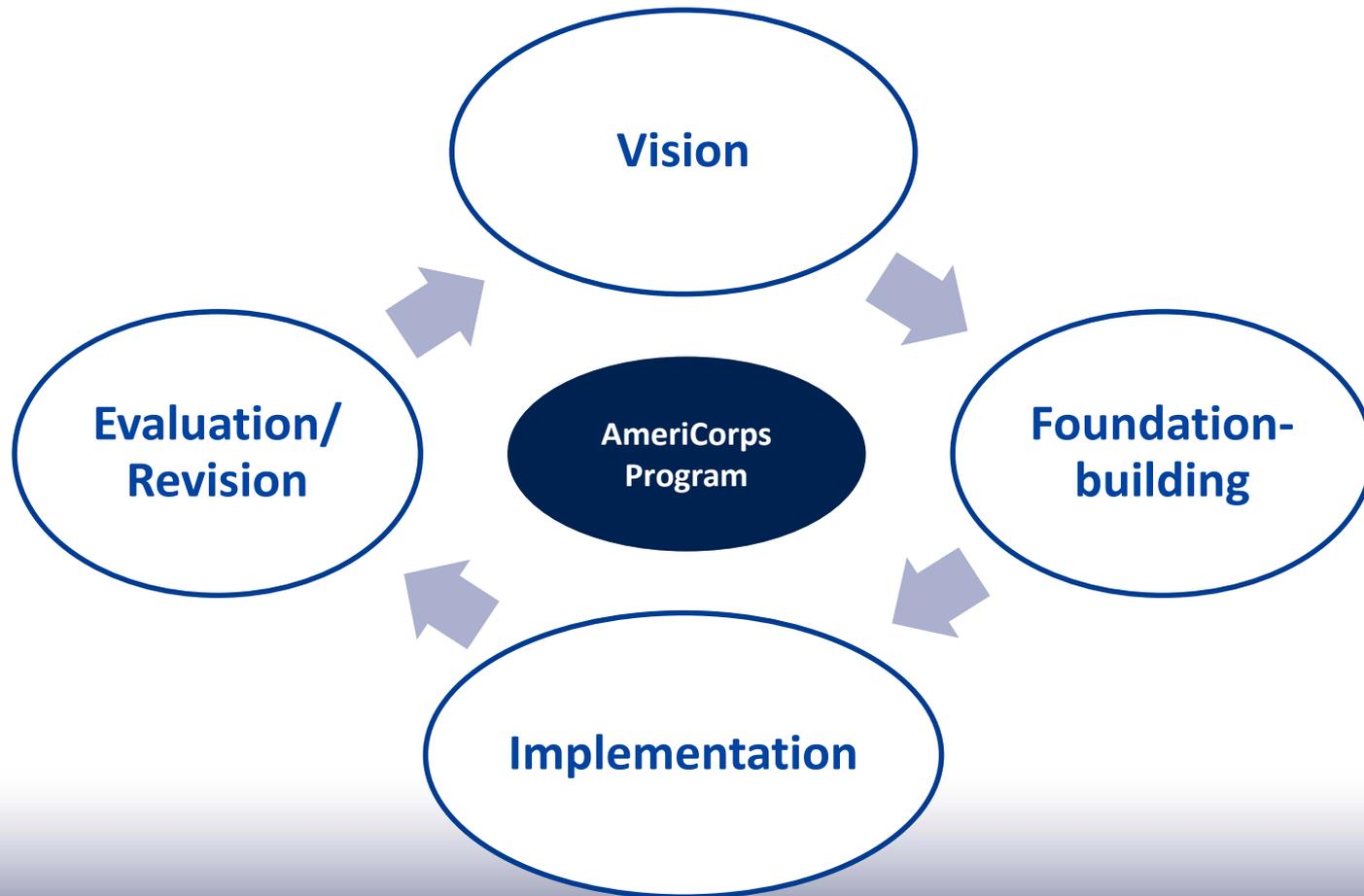
Jul - Sep

- Symposium
- CNCS site visits
- 9/11 Day of Service

Oct - Dec

- GPRs due
- FFRs due
- Make a Difference Day

Cycle of AmeriCorps Program Development



Responsibilities: Program Director



General Expectations:

- Promote national and community service
- Successfully complete project outlined in approved AmeriCorps grant application
- Meet reporting and compliance deadlines
- Ensure compliance with all AmeriCorps requirements
- Serve as CNCS primary contact for all grant functions

Examples of AmeriCorps Program Director Duties:

- Financial management
- Personnel management (staff, AmeriCorps members, site supervisors, volunteers)
- Strategic and operational planning and implementation
- Oversight and monitoring (staff, members, sites, volunteers)
- Reporting and evaluation

Sample Program Director Tasks

DATE	GRANTS	SITES	MEMBERS	TRAINING	EVALUATION
January	Submit GPR, FFR; submit next year's grant application	Monitor current sites; recruit new sites for next year	Monitor current members; recruit new members for next year	Webinar; resource-sharing; service project	Analyze start-up data; adjust current and next year plans
February	Confirm Portal compliance	Monitor; recruit	Monitor; recruit	Mid-year retreat	Collect program data and mid-year reviews
March	Confirm Portal compliance	Monitor; recruit	Monitor; recruit	Webinar; resource-sharing	Collect and analyze data; adjust plans as necessary
April	Submit GPR, FFR; GARP	Monitor; recruit	Monitor; recruit	Webinar; resource-sharing	Collect and analyze data; adjust plans as necessary
May	Confirm Portal compliance	Monitor; select new sites	Monitor; recruit	Life After AmeriCorps	Collect and analyze data; adjust plans as necessary
June	Confirm Portal compliance	Monitor; train new sites	Monitor; recruit	Webinar; resource-sharing	Collect final data

Sample Program Director Tasks

DATE	GRANTS	SITES	MEMBERS	TRAINING	EVALUATION
July	Submit GPR, FFR; review next year's NGA	Sites recruit members	Exit; selection	Finale	Collect final program data and performance reviews
August	Confirm Portal compliance	Sites recruit members	Selection; complete all NSCHC	Preparation	Analyze data; prepare final program year report; adjust next year plans; update long-term plans
September	Confirm Portal compliance	Pre-service	On-board	Pre-service	Collect start-up data
October	Submit GPR, FFR; prepare application	Monitor (site visits)	Monitor (site visits)	Webinar; resource-sharing	Collect and analyze data; adjust plans as necessary
November	Confirm Portal compliance; prepare application	Monitor (site visits)	Monitor (site visits)	Webinar; resource-sharing; service project	Collect and analyze data; adjust plans as necessary
December	Confirm Portal compliance; prepare application	Monitor (site visits)	Monitor (site visits)	In-service training (sites and members)	Collect and analyze data; adjust plans as necessary

Sample CNCS Communications Calendar

 1st or 2nd Tuesdays of the month: AmeriCorps State and National Update Call for state commissions, direct programs, and tribal grantees

 Monthly call with Program Officer: exact date and time will vary

 AmeriCorps Staff Development Webinar: topics and dates vary

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
MAY 2018						
		1	2	3	4	5
6	7	8 	9	10	11	12
13	14 	15	16	17	18	19
20	21	22	23	24 	25	26
27	28	29	30	31		

Role of the AmeriCorps State and National Program Officer

The AmeriCorps State and National Program Officer (PO) can help programs manage the communications and requests from multiple CNCS units. The PO is the primary point of contact at CNCS.

These are the key elements of the PO's job:

- Portfolio management, including TTA
- Grant process support
- AmeriCorps State and National committee work
- CNCS cross-unit committee work

CNCS PO Portfolio Management

- Each PO has a group of AmeriCorps State and National direct and commission grantees that she/he manages.
- In this capacity, the PO:
 - ✓ Monitors grantees
 - ✓ Reviews and clarifies Grantee Progress Reports
 - ✓ Connects grantees with resources
 - ✓ Helps troubleshoot grant or program issues

Communication Basics (1 of 3)

Types of communication with your PO:

- Online/database contact information
- Phone
- Email
- In-person



Communication Basics (2 of 3)

Be sure to:

- Verify eGrants contacts each month
- Provide 2 contacts for the internal AmeriCorps distribution list when requested (these are email lists used by ASN); update the list when requested
- Sign up for alerts on the CNCS website
- Maintain a schedule of monthly check-in calls with your PO
- Participate in recurring and episodic conference calls scheduled by CNCS
- Always copy your PO on emails sent to other CNCS staff
- Whenever possible and as appropriate, engage your PO in events, service projects, trainings, etc.

Communication Basics (3 of 3)

Be sure your PO has:

- All your great news as soon as possible; don't wait until your GPR to share news of a great accomplishment or meaningful service story; POs love great news!
- Adequate backstory and context on important program work (especially details that are not part of CNCS-required reports)
- An understanding of special circumstances that impact your ability to be successful
- An immediate heads up on any unexpected developments (for example, a member grievance or notice of investigation from the Office of Inspector General)

Beyond the Basics



- In addition to maintaining regular and positive communication with your PO, there are other ways that you can engage CNCS in program business or help inform the agency's work.
- Each year, there are multiple opportunities for you to share, advise, and volunteer.

Share



- Be pro-active about collecting and sharing powerful stories and images that depict the impact of national service. You can share these stories with CNCS via your PO, on the CNCS website, and through social media.
- This builds our ability to tell the national service story to potential AmeriCorps members, Congress, the general public, etc., and it keeps us all connected to our shared mission of service.



Advise



- Each year, CNCS asks for input on core agency functions via the Federal Register, written surveys, or conference calls.
- It is critical that programs engage in this type of feedback, since the results of the proposed grant guidance, regulations, or policies will directly impact the communities and members served.
- Sign up for the official email distributions on the CNCS website; and check with your PO about all upcoming opportunities to provide input to CNCS.

Volunteer



- There are also various opportunities to volunteer to help design or deliver aspects of CNCS or AmeriCorps State and National work each year.
- You will receive invitations to help test new grant reports or training materials, speak on panels or webinars, coordinate service projects, and more.
- Check with your PO about all upcoming opportunities to volunteer, and, if your schedule permits, get involved in one or more of these opportunities.

Making the Most of the PO Relationship

In addition to general guidance provided earlier, programs can also:

- Directly communicate your support needs or other feedback.
- Remind your PO if you've asked for something and not received it in the requested timeframe.
- Tailor the agendas for the monthly calls to best meet your needs.

CNCS Organizational Culture

- Federal agency; bound by President's budget, Congressional appropriations, government procurement rules, etc.
- Made up of multiple units and staff; 50+ years of national service laws, regulations, staff guidance to navigate; programs may need to know and manage a variety of programs
- Voluminous communications from various units and staff; requests or deadlines may overlap

Today's Agenda



- ✓ Program Staff Key Knowledge and Skills
- ✓ Possible Phases of Learning for New Staff
- ✓ The CNCS Relationship
 - ✓ CNCS Year-at-a-Glance and Cycle of AmeriCorps Program Development
 - ✓ Role of the AmeriCorps Program Director
 - ✓ Role of the CNCS Program Officer
 - ✓ CNCS Organizational Culture
- Guest Speakers: Natalia Lopez and Fiorella Morales, IRC
- Resources
- Q&A and Wrap-up

Guest Speakers



- **Natalia Lopez**

Senior Program Officer, Volunteers
& AmeriCorps

International Rescue Committee

Natalia.Lopez@Rescue.org



- **Fiorella Morales**

Volunteer Operations Manager

International Rescue Committee

Fiorella.Morales@Rescue.org

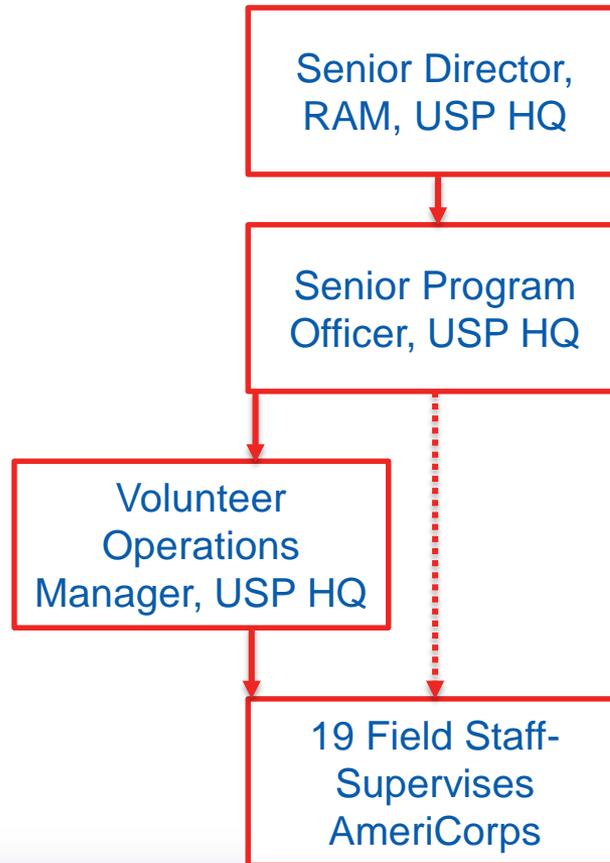


IRC At A Glance



Name	What we do?
Mission	The International Rescue Committee responds to the world's worst humanitarian crises and helps people whose lives and livelihoods are shattered by conflict and disaster to survive, recover, and gain control of their future
US Programs	Domestically, our 28 offices across the U.S. ensure new arrivals have food, shelter, and clothing, and work with refugees to help them gain self-sufficiency.
AmeriCorps Programming	<ul style="list-style-type: none">• 2 National Direct Grants• 41 AmeriCorps members in 19 US Program offices• Focus: Providing support in the areas of Job Training, Job Placement, and Health Services

Org Chart



Orientation for HQ Staff

Orientation Guide

- Provides overview of team and department
- Provides supervisor and self-guided orientation links

90 Day Action Plan

- Outlines primary tasks, meetings and responsibilities of a new employee in their first 90 days with the organization.

Goal Setting Form

- Focuses on key responsibilities, performance goals, and professional development

Orientation for HQ Staff

Section Two: Onboarding Checklist: Supervisor and Self-Guided Orientation

Supervisor Orientation: Please review and discuss the additional documents added to this guide with your supervisor.

Self-Guided Orientation: The following is a list of resources (eLearning modules, websites, documents, videos, etc.) to review in your first weeks in order to learn more about AmeriCorps program policies, US Programs and the IRC as a

IRC, AmeriCorps, & Volunteer Management	
Topic	Checklist
IRC's AmeriCorps Program Policies	<ul style="list-style-type: none"> <input type="checkbox"/> Read ICM AmeriCorps proposal and Job Training/Job placement AmeriCorps proposal. <input type="checkbox"/> Read ICM AmeriCorps Staff Handbook and Job Training/Job Placement Staff Handbook (slightly different for each program – note the differences in data collection and budget) <input type="checkbox"/> Watch FY18 IRC AmeriCorps Program – Part I <input type="checkbox"/> Watch FY18 IRC AmeriCorps Program – Part II <input type="checkbox"/> Watch FY18 Member Management and Support <input type="checkbox"/> Review National AmeriCorps RescueNet Team Site; request to become an owner/admin on the site <input type="checkbox"/> Log into our eGrants account and review the different applications, etc.) <input type="checkbox"/> Bookmark Passwords and Logins list
CNCS Regulations/Monitoring	<ul style="list-style-type: none"> <input type="checkbox"/> Be introduced to Tova Pertman, our CNCS Program Manager <input type="checkbox"/> Complete CNCS NSCHC e-course and save certificate <input type="checkbox"/> Bookmark CNCS Student Loan Forbearance Guide <input type="checkbox"/> Bookmark CNCS Disallowance/Enforcement Guide <input type="checkbox"/> Bookmark CNCS Education Award FAQ <input type="checkbox"/> Review the Member Files and Monitoring page on Tool <input type="checkbox"/> Review monitoring reports from FY17 and FY16

Goal Setting Form



Review Period: From [Click here to enter a date.](#) **To** [Click here to enter a date.](#)

EMPLOYEE

Employee Name: [Click here to enter text.](#) **Title:** [Click here to enter text.](#) **Date:** [Click here to enter text.](#)

Work with your manager to discuss and agree at least **3** goals for your work over the next **3-6 months**.

Try to write at least 2-3 performance goals, focused on your key areas of responsibility. Then, write 1 goal about an area of growth/development. To create a development goal, consider a strength you would like to get even better in, or a challenging area you wish to improve in.

Your goals should be SMART (specific, measurable, actionable, **realistic, timebound**). For tips on creating SMART goals, [click here](#). For an e-learning module on how to write a good goal, [click here](#).

Goal 1:



90-Day Action Plan

Fiorella Morales

RAM Team Goal: The role of the RAM team is to improve outcomes for field offices on their fundraising and community engagement efforts by providing technical support and building the capacity of offices and staff members.

Volunteer Management Sub-Goal: Provide technical support and improve outcomes for field offices on community engagement efforts, specifically in the areas of:

- Volunteer and Intern Management
- AmeriCorps Program Management

Key Objectives to be accomplished within first 90 days	Accomplishments	Date Completed
1. Review all onboarding materials and gain a better understanding of volunteer, intern, and AmeriCorps management guidelines and requirements.		
2. Review all AmeriCorps member files, ensure all files are up to date.		
3. Review AmeriCorps data and submit AmeriCorps mid-year grantee report (due date: April 30).		
4. Conduct bi-monthly check-ins with AmeriCorps members.		
5. Develop mid-year memos for offices, send to offices and schedule follow up meetings in the month of May.		
6. Organize and facilitate a mid-year national training for members. Consider scheduling other trainings throughout the year.		
7. Schedule monitoring trip.		
Key Learning Priorities for First 90 days	Learning Method and Timeframe	Date Completed
1. Understand all AmeriCorps program requirements and guidelines.		
2. Understand pulling reports and sending out community user logins on Salesforce		
3. Understand and collaborate with internal staff on USP HQ intern placement.		

Orientation
COMMUNITY
SERVICES



HQ Staff - Highlights & Challenges

Highlights:

- Provides a better understanding of the functions within the organization and the AmeriCorps program
- Builds a strong manager-employee relationship
- Provides insight on performance expectations early on
- Easier access to resources

Challenges:

- Learning policies and regulations implemented by the organization and field offices
- Learning how to navigate employee relations
- Navigating expectations and results
- Training on specific systems



Orientation for Field Staff

Webinar Series

- 3 part webinar series that provides and overview on: 1) Program Updates and Preparing for Recruitment; 2) Member Management 3) Data Collection

Handbooks and Intranet Page

- Staff handbooks outline program policies discussed during webinar series
- Intranet page to give offices easy access to program resources

Constant Communication

- Constantly checking in with offices during recruitment and on-boarding
- HQ staff accessible to field staff at any point throughout the year

Orientation for Field Staff

International Rescue Committee National Job Training & Job Placement AmeriCorps Program: IRC Supervisors Handbook



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Orientation for Field Staff

National AmeriCorps Program Team Site

- Team Site Home
- Program Announcements
- Calendar
- Gallery
- Monthly Update Archive
- AmeriCorps FAQs
- All Team Site Documents

Member Resources

- Member Handbook
- Member Trainings
- Helpful Documents
- Member Discussion Forum
- AmeriCorps COP

Supervisor Resources

- Supervisor Handbooks
- Supervisor Trainings
- Member Files & Monitoring
- Supervisor Discussion Forum

Administration

- Select Language

National AmeriCorps Program Team Site

For Job Training, Job Placement, & ICM AmeriCorps Members and Supervisors



IRC holds two National AmeriCorps grants from the Corporation for National and Community Service (CNCS). grants allow our offices across the U.S. to host Job Training, Job Placement and ICM AmeriCorps members. This team site brings together members and supervisors across the network to connect and collaborate! Question? Contact Fiorella Morales or Natalia Lopez.

Updates

Write a comment...

You added **AmeriCorps Monthly Update- May 2018**

Comment Like 21 days ago

Igor Radulovic joined the team **National AmeriCorps Program Team Site**

Comment Like 2 months ago

Gallery



Field Staff - Highlights & Challenges

Highlights:

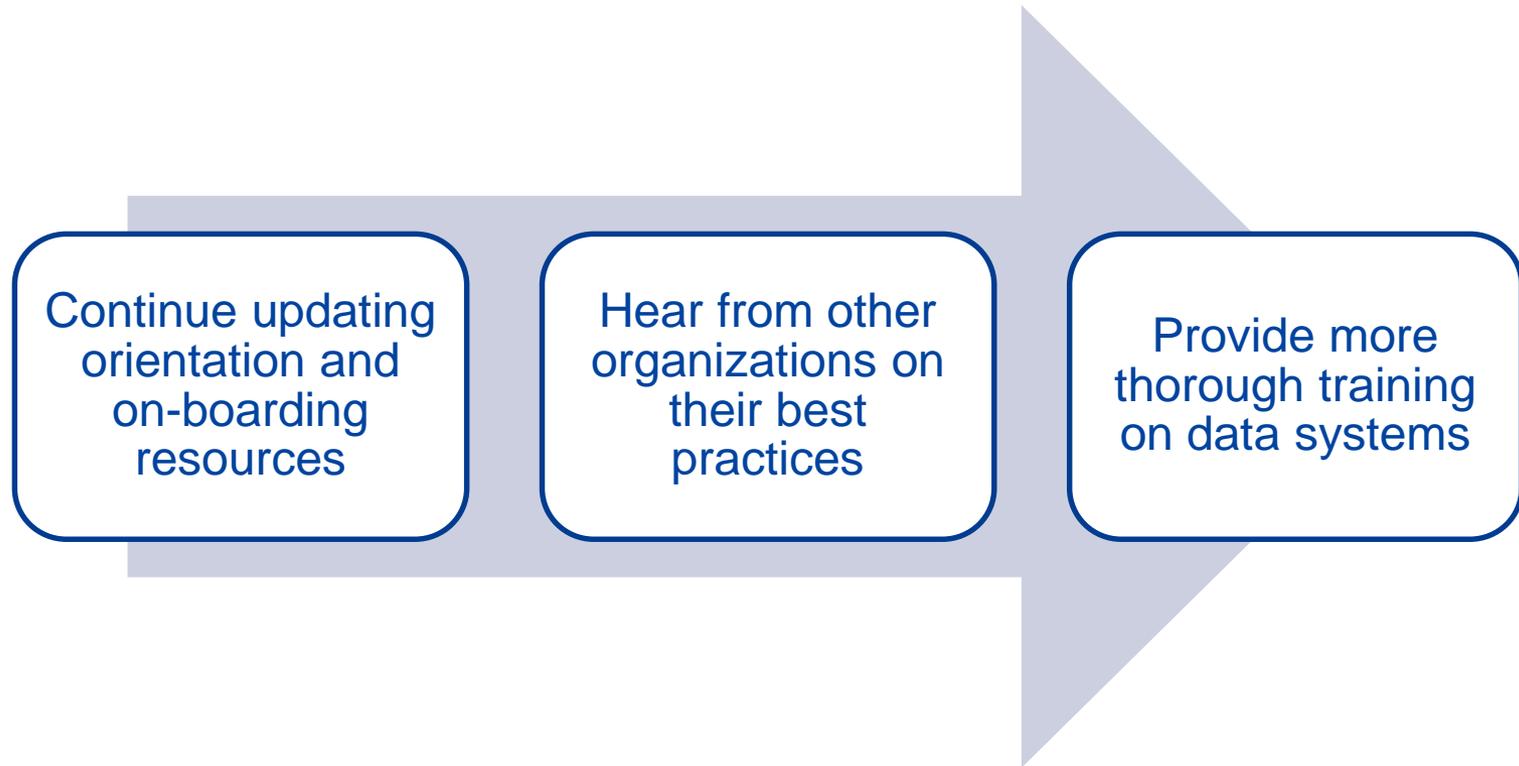
- Provides HQ and field staff with a better understanding of the program
- Better collaboration and support between field staff and HQ
- Easy access to resources

Challenges:

- Transition- onboarding new staff during the middle of the year
- A lot of information
- Training on specific systems



Next Steps





***Thank you,
Natalia and Fiorella!***

Resources

- Sign up for CNCS email lists:
 - www.nationalservice.gov; “Sign up to stay informed!” link in lower right corner
- Managing AmeriCorps Grants:
 - www.nationalservice.gov/build-your-capacity/grants/managing-ameri-corps-grants
- Grant Terms and Conditions:
 - www.nationalservice.gov/resources/financial-management/terms-conditions-and-certifications-assurances-cn-cs-grants
- GPR Resources:
 - www.nationalservice.gov/build-your-capacity/grants/managing-ameri-corps-grants/ameri-corps-state-and-national-grantee-progress
- AmeriCorps State and National Knowledge Network:
 - www.nationalservice.gov/resources/ameri-corps

What questions do you have?



Wrap-up for Today



- Please share feedback on today's webinar:
www.surveymonkey.com/r/ProgStaffOrien
- The recording of today's presentation will be posted on the Knowledge Network in late June:
www.nationalservice.gov/resources/americorps

Next Staff Development Webinar

- Next AmeriCorps Staff Development Webinar:

July 12, 3:00 – 4:30 pm Eastern

Topic:

Criminal History Check Requirements - Monitoring, Best Practices, and Pitfalls to Avoid

Thank you!

