

Checklist for New AmeriCorps Programs

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

Element	Planned	Done	Where do I look?	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/focus-areas	Review the strategic plan and see how and where your program(s) fits
<ul style="list-style-type: none"> Learn about the general history of national service 			http://www.cns.gov/about/who-we-are/our-history	Learn how CNCS and its programs were created and have evolved
<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"> Review performance measures, and create data collection plans, tools, and data reporting systems 			http://www.nationalservice.gov/build-your-capacity/grants/egrants ; and http://nationalserviceresources.gov/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	
<ul style="list-style-type: none"> Learn about the state commissions and national parent organizations that operate in your area 			Locate AmeriCorps programs by state at http://www.nationalservice.gov/impact-our-nation/state-profiles ; and https://www.nationalserviceresources.gov/state-commission-resources	Check their websites and talk to your program contacts
<ul style="list-style-type: none"> Setup accounts in eGrants and MyAmeriCorps Portal 			http://www.nationalservice.gov/build-your-capacity/grants/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 			http://www.nationalservice.gov/build-your-capacity/grants/egrants	
<ul style="list-style-type: none"> Obtain training in My AmeriCorps 			https://my.americorps.gov/mp/login.do	

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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.nationalservice.gov/build-your-capacity/grants/managing-ameri-corps-grants	Review ALL information
<ul style="list-style-type: none"> Review Notice of Grant Award or state commission or national parent organization contracting document with rules and restrictions 			Review your Memorandum of Understanding, Contract, or Notice of Grant Award	Understanding what is required for AmeriCorps programs will help ensure compliance as you develop your program
<ul style="list-style-type: none"> Review approved grant application and budget submitted to the state commission or national parent organization 			As applicable, review the state commission or national parent organization's database, or http://www.nationalservice.gov/build-your-capacity/grants/egrants	You will need an eGrants user name and password
<ul style="list-style-type: none"> Create job descriptions 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	Be sure that all job descriptions are complete, up-to-date, and clearly delineate grant responsibilities
<ul style="list-style-type: none"> Create program policies and procedures for your program 			Consult with your program contact at the state commission or national parent organization; also check with the National Service Knowledge Network	State commissions and national parent organizations have these tools; contact your CNCS Program Officer, state commission, or national parent organization staff for assistance
<ul style="list-style-type: none"> Review other AmeriCorps program guidance 			http://www.americorps.gov/for_organizations/manage/index.asp	Review the "Communications Center"
<ul style="list-style-type: none"> Review program calendar 			Consult with your CNCS Program Officer, state commission, or national parent organization for its calendar with all important deadlines	Grantees should create a calendar that includes all deadlines (internal and external)
<ul style="list-style-type: none"> Review Grantee Progress Report (GPR) processes and deadlines 			Check with your state commission or national parent organization for information on reports	Develop systems (if they are not in place) to collect information periodically so that you will be well-prepared to submit the GPR on time

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<ul style="list-style-type: none">Review Application(s) and 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 each year
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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.nationalservice.gov/build-your-capacity/grants/managing-ameri-corps-grants	Review ALL information at this website; this element is intentionally duplicated in the 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) 			http://www.nationalservice.gov/build-your-capacity/grants/egrants	The Notice of Grant Award is in eGrants, and it provides these specific dates
<ul style="list-style-type: none"> Review approved budget and become familiar with narrative 			http://www.nationalservice.gov/build-your-capacity/grants/egrants	Work with your CNCS Program and Grants Officers to make amendments, if necessary; prior CNCS approval is needed for many program and budget
<ul style="list-style-type: none"> Create tool and process that allows the review of actual to budgeted expenses regularly 			Consult with your accounting department for internal reviews, and view information at http://www.nationalservice.gov/build-your-capacity/grants/egrants	Your Chart of Accounts must correlate to the approved grant budget expense line items
<ul style="list-style-type: none"> Review financial report requirements and develop policies and procedures to ensure compliance 			Review the Grant Provisions and the regulations to determine requirements http://www.nationalservice.gov/build-your-capacity/grants/egrants	Requirements exist for both internal and external reports
<ul style="list-style-type: none"> Create process to submit the Federal Financial Report (FFR) 			Grantees are required to submit the FFR in eGrants: http://www.nationalservice.gov/build-your-capacity/grants/egrants	The FFR is based on actual grant expenditures within the reporting period
<ul style="list-style-type: none"> Create process to report 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 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

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<ul style="list-style-type: none"> Review grant closeout requirements, schedule, and process 		<p>Review your organization's internal policies, and review requirements at http://www.nationalservice.gov/sites/default/files/documents/06_1204_ac_lsa_closeout.pdf</p>	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 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
<ul style="list-style-type: none"> Check partnerships within grant application and follow-up with organizations 		These may be listed in your grant or there should be a contact list available	Grantees are responsible for overall compliance and performance even when they work with partnering organizations
<ul style="list-style-type: none"> Review organizational policies and revise or create policies to meet specific AmeriCorps requirements and functions 		Consult with your accounting department and review existing written policies and procedures; review the list of required policies at the National Service Knowledge Network https://www.nationalserviceresources.gov/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
<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: https://egrants.cns.gov/provisions/Final_2014AmeriCorpsGrantProvisions_20140618.pdf	If your organization operates an AmeriCorps program in more than one state, learn about each state's requirements related to member living allowances
<ul style="list-style-type: none"> Create invoicing and reimbursement processes and deadlines 		Review the Grant Provisions, and other prime grantee documents relating to these topics	These documents vary depending on the prime grantee; if these tools are not available, have not been developed, or you have questions, consult with your state commission or national parent organization contact for information
<ul style="list-style-type: none"> Identify reporting requirements and deadlines 		Consult with your CNCS Program Officer and check grant documents	Timely reporting is essential for compliance

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Member Development and Support				
<ul style="list-style-type: none"> Create member recruitment, selection, retention, and management tools 			http://nationalserviceresources.gov/ac-startup ; and https://www.nationalserviceresources.gov/encorps-resources-support-member-recruitment-and-development	Review “Laying the Foundation: Member Development Plan” on the National Service Knowledge Network
<ul style="list-style-type: none"> Learn about AmeriCorps members’ allowable activities, eligibility, benefits, supervision, recruiting, and management 			https://egrants.cns.gov/provisions/Final_2014AmeriCorpsGrantProvisions_20140618.pdf	Find information on member recruitment and development at https://www.nationalserviceresources.gov/encorps-resources-support-member-recruitment-and-development
<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 https://www.nationalserviceresources.gov/checklists-member-files
<ul style="list-style-type: none"> Create AmeriCorps member orientation and training plan 			https://www.nationalserviceresources.gov/member-training-and-development	Consult with other programs, and the National Service Knowledge Network for examples
<ul style="list-style-type: none"> Create policies and procedures to meet criminal history check requirements 			Review current information: http://www.nationalservice.gov/build-your-capacity/grants/criminal-background-check-requirements	Consult with other programs, and the National Service Knowledge Network for examples
<ul style="list-style-type: none"> Become familiar with AmeriCorps member benefits 			http://www.nationalservice.gov/build-your-capacity/grants/managing-ameri-corps-grants#AmeriCorps	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"> Create AmeriCorps member evaluation requirements 			https://www.nationalserviceresources.gov/monitoring-and-evaluating-members	
<ul style="list-style-type: none"> Develop systems and tools to monitor and evaluate member and project activities 			Create forms and polices regarding member oversight and management http://nationalserviceresources.gov/ac-startup	Review other resources at https://www.nationalserviceresources.gov/monitoring-and-evaluating-members
<ul style="list-style-type: none"> Recruit and enroll members 			Create member position descriptions, member contracts, and service agreements http://nationalserviceresources.gov/ac-startup	Consult with other programs or state commissions for assistance; develop member position descriptions and member service agreements

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Program Development and Management: Staff Supervision and Management				
<ul style="list-style-type: none"> Review staff job descriptions, roles, and responsibilities 			Write descriptions for all positions listed on budget and discussed in application narrative http://nationalservicerresources.gov/ac-startup	Job descriptions should be complete, up-to-date, and contain all grant management responsibilities
<ul style="list-style-type: none"> Create human resource policies or amend existing policies to ensure members are not treated as employees 			Check with your human resource department for personnel policies and check regulations for member requirements http://www.americorps.gov/help/ac_regs/ac_regsRev.htm	These policies vary among organizations; however, specific requirements for members do exist; consult your CNCS Program Officer, state commission, or national parent organization for information
<ul style="list-style-type: none"> Create human resource policies 			Consult with your human resource department	
<ul style="list-style-type: none"> Create staff support and training systems 			Consult with your human resource department	Create and/or review a plan for each staff
<ul style="list-style-type: none"> Review staff promotion policies 			Consult with your human resource department	This should be consistent throughout your entire organization
<ul style="list-style-type: none"> Review staff evaluation processes and tools 			Consult with your human resource 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	

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Community and Site Partnerships				
<ul style="list-style-type: none"> Meet state commission or national parent organization staff 			Review grant application information and Notice of Grant Award from the prime grantee	
<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 and understand cultural issues if programs are located out-of-state
<ul style="list-style-type: none"> Meet with partnering organizations and community agencies 			Check your application on what organization were included as partners then check with local groups	
<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	
<ul style="list-style-type: none"> Meet with existing program partners and review contracts or Memoranda of Understanding 			Internal database or list	Review information about the history, individuals, and partnerships, and compliance requirements
<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"> Create site visit strategies for subgrantees: purpose, focus, schedule, and tools 			Develop for compliance, as well as to 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"> Create opportunities for training and support for subgrantees/sites 			Consult with your CNCS Program Officer for ideas	

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Resources	
<ul style="list-style-type: none"> • Corporation for National and Community Service (CNCS) – This is the federal government agency that provides funding to AmeriCorps programs 	http://www.nationalservice.gov/
<ul style="list-style-type: none"> • 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 AmeriCorps member recruitment listings; selecting applicants and searching for applicants; and financial and progress reporting 	http://www.nationalservice.gov/egrants/
<ul style="list-style-type: none"> • MyAmeriCorps Portal – This resource is designed to help AmeriCorps program staff, applicants, members, and alumni access important information, including the status of education awards 	https://my.americorps.gov/mp/login.do
<ul style="list-style-type: none"> • EnCorps – This website provides a variety of resources to support member recruitment and development 	https://www.nationalserviceresources.gov/encorps-resources-support-member-recruitment-and-development/
<ul style="list-style-type: none"> • AmeriCorps State and National Home Page – This page is a resource for service projects, member management, staff resources and training, financial management, CNCS news, communications center, and AmeriCorps social networks 	http://www.nationalservice.gov/programs/americorps/americorps-state-and-national
<ul style="list-style-type: none"> • National Service Knowledge Network – This is a link from the CNCS website to 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.gov/