

Checklist for New Staff of AmeriCorps Grantees

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) fit
<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"> Review approved prime application (State Service Commission's or National Parent Organization) and sub-applications (subgrantees' or site applications) 			http://www.nationalservice.gov/egrants/	Review all of the information included in the grant application
<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"> Setup accounts in eGrants and MyAmeriCorps portal 			http://www.nationalservice.gov/build-your-capacity/grants/egrants ; and 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 MyAmeriCorps 			https://my.americorps.gov/mp/login.do	
Specific to State Service Commissions				
<ul style="list-style-type: none"> Review State Service Plan 			Review internal program files, and visit http://www.nationalservice.gov/about/contact-us/state-service-commissions/	CNCS statute requires every state have a plan to ensure all national service and volunteer service entities within a state are aware of each other and are coordinating activities
<ul style="list-style-type: none"> Review Commission Administration and all other commission applications, budgets, and grant awards (e.g., VGF) 			http://www.nationalservice.gov/build-your-capacity/grants#provisions	Grant Provisions exist for each type of AmeriCorps grant

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<ul style="list-style-type: none"> Review performance measures, data collection plans and tools, and data reporting systems 			https://egrants.cns.gov/espan/main/login.jsp http://nationalserviceresources.org/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	

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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.americorps.gov/for_organizations/management/index.asp	Review ALL information
<ul style="list-style-type: none"> Review approved grant application and budget submitted to the state commission or national parent organization 			http://www.nationalservice.gov/egrants/	You will need an eGrants user name and password
<ul style="list-style-type: none"> Review 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 you have up-to-date job descriptions that clearly show AmeriCorps grant responsibilities for all staff listed in the narrative and all the budget
<ul style="list-style-type: none"> Review internal program policies and procedures and/or AmeriCorps program handbook 			Check your grant files, and also consult with your program contact at the state commission or national parent organization	Most state commissions and national parent organizations have these tools; if these tools are not available, have not been developed, or you have questions, contact your CNCS Program Officer
<ul style="list-style-type: none"> Review subgrantees' policies 			Could be in written or electronic format; could be outlined in subgrantee memos of agreement	Most programs have these tools; if these tools are not available, have not been developed, or you have questions, contact your CNCS Program Officer
<ul style="list-style-type: none"> Review other AmeriCorps program guidance 			http://www.americorps.gov/for_organizations/management/index.asp	Review the "Communications Center."
<ul style="list-style-type: none"> Review program calendar 			Grantees should create a calendar that includes all relevant deadlines (internal and external)	Most programs have these tools; if these tools are not available, have not been developed, or you have questions, contact your CNCS Program Officer or check the National Service Knowledge Network for samples
<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 this 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) 			Review your grant files, and http://www.nationalservice.gov/build-your-capacity/grants/egrants ; and State Commission or National Parent Organization specific database	The Notice of Grant Award is found in eGrants; it provides these specific dates
<ul style="list-style-type: none"> Review approved budget and become familiar with narrative 			Review your grant files, and http://www.nationalservice.gov/build-your-capacity/grants/egrants ; and State Commission or National Parent Organization specific database	Work with your CNCS Program and Grants Officers to make amendments, if necessary; prior approval is needed for many program and budget changes
<ul style="list-style-type: none"> Review actual to budgeted expenses, and review the process for how expenses are tracked 			Consult with your Accounting Department for internal reviews, and view information at http://www.nationalservice.gov/egrants/	Your Chart of Accounts must correlate to the approved grant budget expense line items
<ul style="list-style-type: none"> Review grant closeout requirements, schedule, and process 			Review your organization's internal policies, and review requirements at http://www.nationalservice.gov/sites/default/files/documents/06_1204_ac_lsa_closeout.pdf	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 financial reports, history, and requirements 			Review your organization's internal documents and review information at http://www.nationalservice.gov/build-your-capacity/grants/egrants	Requirements exist for both internal and external reports
<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 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"> Review Federal Financial Report (FFR) processes and deadlines 			Grantees are required to submit the FFR based on actual expenditures; the FFR is submitted in eGrants	
<ul style="list-style-type: none"> Review 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 subgrantee/site invoicing and reimbursement processes and deadlines 			Review your organization's internal documents	These documents vary depending on the prime grantee; if these tools are not available, have not been developed, or you have questions, contact your CNCS Program Officer or check the National Service Knowledge Network for examples
<ul style="list-style-type: none"> Identify reporting requirements and deadlines 			Consult with your Program Officer and check grant documents	Timely reporting is essential for compliance
<ul style="list-style-type: none"> Understand organization's policies and procedures 			Consult with your accounting department and review written policies and procedures	List of required policies is based on CNCS and Office of Management and Budget regulations
Specific to National and Tribal Programs				
<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 each state's requirements related to member living allowances

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Member Development and Support				
<ul style="list-style-type: none"> Review 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"> Review AmeriCorps 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"> Review AmeriCorps member orientation and training plans 			Review program’s policies and tools, and review https://www.nationalserviceresources.gov/member-training-and-development	
<ul style="list-style-type: none"> Review requirements for criminal history checks 			Review program’s policies and current information: http://www.nationalservice.gov/build-your-capacity/grants/criminal-background-check-requirements	
<ul style="list-style-type: none"> Review AmeriCorps member evaluation requirements 			Review program policies, tools, and documents	Review other resources at https://www.nationalserviceresources.gov/monitoring-and-evaluating-members
Specific to National and Tribal Programs				
<ul style="list-style-type: none"> Learn about the requirements for administering 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
<ul style="list-style-type: none"> Review systems and tools to monitor and evaluate member and project activities 			Review program’s policies and tools	Review other resources at https://www.nationalserviceresources.gov/monitoring-and-evaluating-members

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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 			Check all grant personnel listed on budget and discussed in application narrative: http://nationalserviceresources.gov/ac-startup	Be sure that all grant staff in the narrative and personnel in the budget have complete, current job descriptions that clearly delineate grant duties
<ul style="list-style-type: none"> Review human resource policies 			Consult with your human resource department	
<ul style="list-style-type: none"> Review 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 must 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	
Specific to State Commission Executive Directors				
<ul style="list-style-type: none"> Review commissioner roles, strengths, and responsibilities 			Review bios and have meetings with Each; be sure the contact list is up-to-date	There may be unfilled vacancies; confirm that all required positions are filled
<ul style="list-style-type: none"> Review commissioner appointment process 			Internal process; check by-laws	These vary from commission to commission
<ul style="list-style-type: none"> Meet commissioners and board members 				Individual meetings, conference calls, or at next meeting
<ul style="list-style-type: none"> Review opportunities and strengths of where the State Service Commission is positioned within the state government 			This will depend on which level the commission is located within the state government	Commissions are housed in various state agencies with some operating as independent, nonprofit organizations
<ul style="list-style-type: none"> Review the history of the commission and past highlights 			Review strategic plans, State Service Plans, and commission meeting minutes	

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Community and Site Partnerships				
<ul style="list-style-type: none"> Meet CNCS staff: Program/Grants/Trust Officers 			Review Notice of Grant Award for contacts: http://www.nationalservice.gov/build-your-capacity/grants/egrants	Introductions and getting to know these contacts are key to grant compliance
<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 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"> Review status and outcomes of previous subgrantee/site meetings and identify items for review and follow-up 			Internal records and meeting minutes	
<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
<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
<ul style="list-style-type: none"> Review subgrantee/site project status 			Internal evaluation data	This data is collected on an on-going basis and submitted to CNCS in annual progress reports
<ul style="list-style-type: none"> Review subgrantee/site and program activity, monitoring, evaluation strategy, and expectations 			Review contracts or agreements and cross reference with Grant Provisions and regulations	Expectations should be clear and meet all regulations and reporting requirements
<ul style="list-style-type: none"> Review site visit strategies: purpose, focus, schedule, and tools 			Review for compliance, as well as provide assistance and identify training and technical assistance needs	A risk-based monitoring strategy will assist in efficient use of resources

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• Review opportunities for training and support for subgrantees/sites			Consult with your CNCS Program Officer for ideas	
• Meet subgrantees/sites staff			Conduct face-to-face meetings, conference calls, and Program Director meetings and trainings	
• Meet AmeriCorps members			Consult internal lists by program	Attend meetings at sites or member graduations; observe member service projects
Specific to State Commissions				
• Reach out to the national parent organizations and the national sites in your state			Locate AmeriCorps programs by state at http://www.americorps.gov/about/role_impact/state_profiles.asp	Look for service sites of national or tribal programs operating in your state
Specific to National and Tribal Programs				
• Reach out to the commission in your state and tell your sites to reach out to the commissions where they operate			Locate commissions by state at http://www.nationalservice.gov/about/contact/statecommission.asp	State commissions may provide trainings and events that can connect your program staff and AmeriCorps members to national service opportunities

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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 live data, including information on the education award status 	https://my.americorps.gov/mp/login.do
<ul style="list-style-type: none"> • EnCorps – This website contains a variety of 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 on 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/