

Checklist for New Staff of AmeriCorps Subgrantees or Sites 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 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 state commission or national parent organization staff
<ul style="list-style-type: none"> Review performance measures, data collection plans and tools, and data reporting systems 			Check your grant files; http://www.nationalservice.gov/build-your-capacity/grants/egrants ; and http://nationalserviceresources.gov/ac-startup	These are included as part of your 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 commission or national parent organization priorities 			Consult with your program contact; this will be unique for each organization	Review the state commission or national parent organization website and talk to your program contact
<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 Portal 			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 state commission or national parent organization rules and restrictions 			Review your Memorandum of Understanding or Contract, and the Notice of Grant Award	State commissions or national parent organizations may implement more restrictive requirements to assist in managing its subgrantees
<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"> 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 and listed in application narrative	
<ul style="list-style-type: none"> Review internal program policies and procedures and AmeriCorps program handbook supplied by your state commission or national parent organization 			Check your grant files, and also consult with your program contact at the state commission or national parent organization	
<ul style="list-style-type: none"> Review other AmeriCorps program-related guidance 			http://www.americorps.gov/for_organizations/manage/index.asp	Review the "Communications Center"
<ul style="list-style-type: none"> Review program calendar 			Your state commission or national parent organization may have a calendar that includes all important deadlines	If there is no existing formal calendar, set up a meeting with your program contact and review critical dates, then create your own calendar
<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
<ul style="list-style-type: none"> Review Application(s) and Notice(s) of Funding Opportunity (NOFO) deadlines 			Check with your State Commission or National Parent Organization for information on funding opportunities and deadlines	The requirements for submission and deadlines vary by commission, national, or tribal program

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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 (project 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 in eGrants provides these specific dates; consult with your program contact for details
<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 State Commission or National Parent Organization contact to make amendments if necessary; prior CNCS approval is needed for many 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/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 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 reporting history and requirements 			Review your organization's internal documents, and review information at http://www.nationalservice.gov/build-your-capacity/grants/egrant	Requirements exist for both internal and external reports
<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

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<ul style="list-style-type: none"> Review partnerships connected with the grant application 			<p>These may be listed in your grant or your grant files should have a contact list</p>	<p>Review information about history, individuals, and partnerships</p>
<ul style="list-style-type: none"> Review the organization's policies and procedures 			<p>Consult with your accounting department and review written policies and procedures; review the list of required policies at https://www.nationalserviceresources.gov/files/P-11_Internal_-_HO1_Policies_and_Procedures_11-15-10.pdf</p>	<p>List of required policies is based on CNCS and Office of Management and Budget regulations</p>
<ul style="list-style-type: none"> Learn policies, procedures, and issues related to member living allowances 			<p>CNCS regulations and Grant Provisions specify member living allowance guidelines: http://www.nationalservice.gov/build-your-capacity/grants#provisions</p>	<p>If your organization operates an AmeriCorps program in more than one state, know each state's requirements related to member living allowances</p>
<ul style="list-style-type: none"> Review invoicing and reimbursement processes and deadlines 			<p>Review your organization's internal documents; consult with your accounting department and program contact</p>	<p>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</p>
<ul style="list-style-type: none"> Identify reporting requirements and deadlines 			<p>Consult with your program contact and check grant documents</p>	<p>Timely reporting is essential for compliance</p>

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Member Development and Support				
<ul style="list-style-type: none"> Review member recruitment, selection, retention, and management tools 			http://nationalservicerresources.gov/ac-startup https://www.nationalservicerresources.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.nationalservicerresources.gov/encorps-resources-support-member-recruitment-and-development
<ul style="list-style-type: none"> Become familiar with AmeriCorps member file requirements 			Review program’s tools and documents related to member file management	Review other resources at https://www.nationalservicerresources.gov/checklists-member-files
<ul style="list-style-type: none"> Become familiar with AmeriCorps member orientation and training plans 			Review program’s policies and tools; https://www.nationalservicerresources.gov/member-training-and-development	Consult with other programs and the National Service Knowledge Network for samples
<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.nationalservicerresources.gov/monitoring-and-evaluating-members
<ul style="list-style-type: none"> Learn the rules and requirements for administering AmeriCorps member benefits 			http://www.nationalservice.gov/build-your-capacity/grants/managing-ameri-corps-grants#AmeriCorps	Grant Provisions specify requirements; however, some programs have additional benefits for members
<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.nationalservicerresources.gov/monitoring-and-evaluating-members

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<ul style="list-style-type: none"> Meet AmeriCorps members 			Consult internal lists by program	Review member position descriptions, service activities, and member contracts; attend meetings at sites or graduations; observe member service projects; invite members to meetings
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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 staff and personnel listed on budget and discussed in application narrative http://nationalserviceresources.gov/ac-startup	Be sure that all staff and personnel in the budget and application narrative have complete and current job descriptions; clearly delineate grant responsibilities
<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
<ul style="list-style-type: none"> Cross train 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 			Internal contact list	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 with partnering organizations and community agencies 			Consult with your state commission or national parent organization contacts	
<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, 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
<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 site visit strategies: purpose, focus, schedule, and tools 			Review for compliance and to identify training and technical assistance needs	A risk-based monitoring strategy will assist in efficient use of resources
<ul style="list-style-type: none"> Review opportunities for training and support for sites 			Consult with your state commission or national parent	
<ul style="list-style-type: none"> Meet AmeriCorps members 			Consult internal lists by program	Attend meetings at sites or member graduations; observe member service projects; invite members to board meetings

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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 critical information, including the status of the education award 	https://my.americorps.gov/mp/login.do
<ul style="list-style-type: none"> • EnCorps – This website contains 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 website is designed as 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/