

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 to find or look?	Tips/Hints
Program Development & Management: Policies & Guidelines				
<ul style="list-style-type: none"> Review National Community Service Trust Act of 1990, AmeriCorps Regulations, AmeriCorps Provisions, and AmeriCorps State and National FAQs 			http://www.americorps.gov/for_organizations/manage/index.asp	You want to review ALL information as these include what is required for AmeriCorps programs and will help you to ensure compliance as you develop your program
<ul style="list-style-type: none"> Review Notice of Grant Award or National Parent or State Commission contracting document with rules and restrictions 			Review your Memorandum of Understanding, Contract or Notice of Grant Award.	In order to manage and oversee programs State Commission or National Parent Organizations can implement more restrictive requirements
<ul style="list-style-type: none"> Review approved grant application and budget submitted to the State Commission or National Parent Organization 			http://www.nationalservice.org/egrants/	You will need an eGrants user name and password. This is the information that your organization used as the application for funding.
<ul style="list-style-type: none"> Create job description for all staff on grant including: roles, responsibilities and specific member requirements 			Check for all positions listed on budget or discussed in application narrative	Check the NSRC for samples
<ul style="list-style-type: none"> Create program policy and procedures for your program. 			Check with your program contact at the Commission or National Parent organization if you are a grantee. Also check with the NSRC	Contact your CNCS Program Officer, Commission or National Parent Organization staff for assistance
<ul style="list-style-type: none"> Review other AC program related guidance 			http://www.americorps.gov/for_organizations/manage/index.asp	Check out the Communications Center, look at “Other Resources” for forms and other information
<ul style="list-style-type: none"> Create program calendar 			Your CNCS Program Officer, National Parent or State Commission probably has a calendar that includes all relevant deadlines.	Check the NSRC for examples
<ul style="list-style-type: none"> Review Grantee Progress Report (GPR) processes and deadlines 			Check with your funder on reports deadlines	Develop systems to collect information periodically instead of waiting until the reports are due
<ul style="list-style-type: none"> Review Application(s)/Notice(s) of Funding Opportunity (NOFO) deadlines 			Check with your CNCS Program Officer ,State Commission or National Parent Organization for information on reports	The requirements for submission and deadlines vary

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Program Development & Management: Program Goals, Priorities and Strategies				
<ul style="list-style-type: none"> Learn about the general history of national service 			http://www.cns.gov/about/role_impact/history.asp	Learn how the Corporation and their programs were created and have evolved
<ul style="list-style-type: none"> Learn about the Corporation for National and Community Service (CNCS) program priorities and strategic initiatives 			http://www.cns.gov/about/focus_areas/index.asp	Review the strategic plan and see how and where your program fits
<ul style="list-style-type: none"> Identify critical issues to be addressed within your program 			This will be unique for each organization and should help with prioritizing and planning	Utilize board, staff (current and former), and National Parent Organization or State Commissions staff.
<ul style="list-style-type: none"> Refine performance measures, and create data collection plan and tools, and data reporting systems 			http://www.nationalservice.org/egrants/ http://nationalserviceresources.org/ac-startup	These are included as part of your grant application
<ul style="list-style-type: none"> Figure out how your AmeriCorps program fits within the other programs at your organization 			Talk to fellow staff	This will vary program by program
<ul style="list-style-type: none"> Learn about National Organization or State Commission that operates in your area 			You can get information about programs in your state at www.cns.gov This will be unique for each organization	Check their website and talk to your program contact
<ul style="list-style-type: none"> Setup accounts in eGrants and my AmeriCorps Portal 			http://www.nationalservice.org/egrants/	There are two different systems when working with AmeriCorps grants, one for grants management and the other for member management
<ul style="list-style-type: none"> Train in eGrants systems 			http://www.nationalservice.org/egrants/ and https://my.americorps.gov/mp/login.do	Grants management and reporting is completed in this system
<ul style="list-style-type: none"> Train in My AmeriCorps Portal 			http://www.americorps.gov/	AmeriCorps member management is completed in this system

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Finance & Grants Management				
<ul style="list-style-type: none"> Review National Community Service Trust Act of 1990, AmeriCorps Regulations, AmeriCorps Provisions, and AmeriCorps State and National FAQs 			http://www.americorps.gov/for_organizations/manage/index.asp	You want to review ALL information. This information is intentionally duplicated in this section as it is critical for both program and fiscal staff
<ul style="list-style-type: none"> Check grant funding periods (project period, budget period, and member enrollment period) 			http://www.nationalservice.org/egrants/	The Notice of Grant Award will provide specific dates
<ul style="list-style-type: none"> Review approved budget and become familiar with narrative 			http://www.nationalservice.org/egrants/	Work with your CNCS Program Officer, State Commission or National staff to make amendments if necessary. Prior approval is needed for many budget changes.
<ul style="list-style-type: none"> Create tool that allows actual expenses to date to be reviewed periodically. 			Check with your fiscal department and http://www.nationalservice.org/egrants/	If you closely align the categories in your accounting system with your budget line items this process will be facilitated
<ul style="list-style-type: none"> Review financial reporting requirement and develop policies and procedures 			http://www.nationalservice.org/egrants/	Grantees should establish a written policy on when budget to actual expenses re reviewed and who is responsible for the review.
<ul style="list-style-type: none"> Review matching fund sources listed in application and any match raised to date 			You should find internal documentation, your finance department should have information	Note there could be anticipated funds listed in application, be sure you know what funds have been received and/or committed
<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 incorporate them into policies for specific AmeriCorps functions 			Check for both fiscal and program policies	A few examples will include: reimbursements, reporting, allowable costs
<ul style="list-style-type: none"> Understand issues relating to member payroll and create polices and procedures 			Internal in payroll or accounting system. Be sure if you operate in several states that you check for state specific requirements	Check the regulations and policy FAQs as there are important requirements regarding Living allowance taxability and distribution.
<ul style="list-style-type: none"> Create invoicing and/or reimbursement process and check against required process and deadlines 			You should find internal documentation, your finance department should have information	Ask your State Commission or National staff for information. If you are a direct grantee of the Corporation you can develop your own system.

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Member Development & Support				
• Setup accounts in eGrants and my AmeriCorps Portal			http://www.nationalservice.org/egrants/	There are two different systems when working with AmeriCorps grants, one for grants management and the other for member mangment
• Train in eGrants systems			http://www.nationalservice.org/egrants/ and https://my.americorps.gov/mp/login.do	Grants management and reporting is completed in this system
• Train in My AmeriCorps Portal			Need address	AmeriCorps member management is completed in this system
• Learn about AmeriCorps members allowable activities, eligibility, benefits, supervision, recruiting and management			The definition is found in the grant provisions http://www.americorps.gov/for_organizations/manage/index.asp#provisions	There is member resource information to help you understand found at http://encorps.nationalserviceresources.org
• Create policies and procedures for member recruitment, selection and retention			There is member resource information to help you understand found at http://encorps.nationalserviceresources.org http://nationalserviceresources.org/ac-startup	Check the “Building the Program: Member Development and Support” section at the NSRC for information
• Become familiar with member file requirements			Internally where member information is kept	There are several checklists and samples to ensure proper document, check with your State Commission or National staff or look at the NSRC
• Develop systems and tools to monitor and evaluate member and project activities			You will need to create forms and polices regarding member oversight and management. http://nationalserviceresources.org/ac-startup	Be sure to clarify the evaluation requirements for members as they vary by MSY type
• Hire Members			Create member descriptions and recruit new members http://nationalserviceresources.org/ac-startup	Use tools that are already in existence as starting points.

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Program Development & Management: Staff Supervision & Management				
<ul style="list-style-type: none"> Review staff position descriptions, roles & responsibilities 			Check for all positions listed on budget or discussed in application narrative http://nationalserviceresources.org/ac-startup	If you do not have these put them on your to do list, check the NSRC for samples
<ul style="list-style-type: none"> Learn human resources policies and be sure to amend to accommodate members that are not employees but receive benefits that can be the same as staff or can be different as long as they meet requirements listed in regulations 			Check with human resources department for personnel policies and then check regulations for Member insurance requirements http://www.americorps.gov/help/ac_regs/ac_regsRev.htm	These policies vary greatly from organization to organization however the insurance requirements for Members are specific. Check with your CNCS Program Officer, National Parent Organization or State Commission for information on options.
<ul style="list-style-type: none"> Learn staff support and training systems 			Check with your human resources department	Create and/or review a plan for each staff
<ul style="list-style-type: none"> Learn staff promotion policies 			Check with your human resources department	This will vary by organization
<ul style="list-style-type: none"> Learn staff evaluation processes & tools 			Check with your human resources department	Review previous staff evaluations and the tool that is used for staff evaluations
<ul style="list-style-type: none"> Cross train staff 			Employee work plans	This will help with any future transition

Aspect/Element	Planned	Done	Where to find or look?	Tips/Hints
Community & Site Partnerships				
<ul style="list-style-type: none"> Meet State Commission or National Parent Organization staff 			Find program in your area at http://www.americorps.gov/Default.asp	This information should be found on your Notice of Grant Award or contract
<ul style="list-style-type: none"> Get to know key state & local contacts 			Learn the key stakeholders that can help you meet your program goals and priorities	Learn about the history, individuals and partnerships to set context. Be sure to find out cultural issues of location
<ul style="list-style-type: none"> Meet with partnering organizations & community agencies 			Check your application on what organization were included as partners then check with local groups	Be sure to connect with other national service partners, Senior Corps, Learn and Serve and other AmeriCorps programs and Commissions
<ul style="list-style-type: none"> Meet with program partners/partnerships that were named in application and develop contracts or Memorandum of Understanding 			Internal database or list	Learn about the history, individuals and partnerships to set context
<ul style="list-style-type: none"> Get to know key media contact 			Develop internal database or list	Learn about the history, individuals and partnerships to set context this can be key for outreach and education purposes
<ul style="list-style-type: none"> Educate/Review political culture within state & local area and key contacts 			Develop internal database or list	Learn about the history, individuals and partnerships to set context this can be key for outreach and education purposes