

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 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
<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.
<ul style="list-style-type: none"> Review job description for all positions on grant: roles, responsibilities and specific member guidelines 			Check for all positions listed on budget or discussed in application narrative	If you do not have these put them on your to do list, check the NSRC for samples
<ul style="list-style-type: none"> Review internal program policy and procedures or internal AmeriCorps program handbook 			Check your files and resource materials, this is an internal tool	Many established Commissions have these tools. If these tools are unavailable, have not been developed, or you have further questions, contact your CNCS Program Officer
<ul style="list-style-type: none"> Review sub-recipients policies 			Possibly in handbook or could be outlined in sub-recipient memos of agreement if they exist	Many established Programs have these tools. If these tools are unavailable, have not been developed, or you have further questions, contact your CNCS Program Officer or check the NSRC
<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"> Review program calendar 			Grantees should create a calendar that includes all relevant deadlines, many of which are internal	Many established programs have these tools. If these tools are unavailable, have not been developed, or you have further questions, contact your CNCS Program Officer or check the NSRC
<ul style="list-style-type: none"> Review Application(s)/Notice(s) of Funding Opportunity (NOFO) deadlines 			http://www.cns.gov/for_organizations/funding/index.asp	All CNCS funding opportunities are available
<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

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Program Development & Management: Program Goals Priorities & Strategies				
<ul style="list-style-type: none"> Review 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(s) fit
<ul style="list-style-type: none"> Review prime application (Commission's or National Parent application) & sub-applications (sub-grantees' or sites applications) 			http://www.nationalservice.org/egrants/	Review the all of the information included in the grant application.
<ul style="list-style-type: none"> Identify critical issues needed to be addressed with possible resources 			This will be unique for each organization and should help with prioritizing and planning	Utilize Board, Staff (current and former), sites and subgrantees, and CNCS Program and Grants Officers.
<ul style="list-style-type: none"> Identify reporting requirements and deadlines 			Check with your Program Officer and check grant documents	Timeliness of reporting is important
Specific to State Commissions				
<ul style="list-style-type: none"> Review Commission's Strategic Plan 			This will be unique for each State Commission	Many established Commissions have these tools. If these tools are unavailable, have not been developed, or you have further questions, contact your CNCS Program Officer.
<ul style="list-style-type: none"> Review Unified State Plan 			This will be unique for each State Commission	Many established Commissions have these tools. If these tools are unavailable, have not been developed, or you have further questions, contact your CNCS Program Officer.
<ul style="list-style-type: none"> Review State Commission Standards 			http://www.americorps.gov/for_organizations/manage/oversight.asp	Look to find when the last "Standards Review" was held and check the information in the files
<ul style="list-style-type: none"> Review Admin/PDAT/Disability Provisions, budgets and grant awards 			http://www.americorps.gov/for_organizations/manage/index.asp#provisions	There are different provisions AmeriCorps grants that for these types of grants
Specific to National Programs				
<ul style="list-style-type: none"> Review performance measures, 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"> Learn how the AmeriCorps program is integrated into the organization and how the program fits in with parent organization's strategic plan. 			This will be unique for each organization	

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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"> Review 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 Program/Grants officers to make amendments if necessary. Prior approval is needed for many program & budget changes.
<ul style="list-style-type: none"> Review actual expenses to date, and review the process for how expenses are tracked. 			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"> If your grant is scheduled to end within the next few months, review grant closeout schedule & process 			http://www.americorps.gov/for_organizations/manage/index.asp#closeout%20documents	Grants are generally granted for a three year period and closeout occurs 90 days after the end of a grant period
<ul style="list-style-type: none"> Review financial reports 			http://www.nationalservice.org/egrants/	There will be both internal and external reports
<ul style="list-style-type: none"> Review drawdown of grant funds procedure 			You should find internal documentation, your finance department should have information	You are only allowed to drawdown grant funds for immediate need
<ul style="list-style-type: none"> Review matching fund sources and 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"> Review Financial Status Report (FSR) or Federal Financial Report (FFR) processes and deadlines 			Grantees are required to submit FSR/FFR in http://www.nationalservice.org/egrants/	The FSR is currently the required financial reports and the FFR is scheduled to replace the FSR in 2009 check Policy FAQs for Updates
<ul style="list-style-type: none"> Review Federal Cash Transaction Report (FCTR) also known as SF-272 process and deadlines 			http://www.dpm.psc.gov/	CNCS contracts with the Dept of Health & Human Service to make payment on grants. Check with your finance dept.
<ul style="list-style-type: none"> Review subgrantee/site reimbursement and reporting processes and deadlines 			You should find an internal document, this will be unique for each organization	Many established Commissions have these tools. If these tools are unavailable, have not been developed, or you have further questions, contact your CNCS Program Officer or check the NSRC
Specific to National Programs				
<ul style="list-style-type: none"> Understand policies, procedures and issues relating to member payroll 			Some organizations have centralized payroll and others have sites pay members directly	Check the regulations and Policy FAQs as there are important requirements regarding Living allowance taxability and distribution.

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Member Development & Support				
<ul style="list-style-type: none"> • Setup accounts in WBR/eGrants/Portal and train in the use of the systems 			http://www.nationalservice.org/egrants/ https://my.americorps.gov/mp/login.do	Members are enrolled in a computer system, check with your Program Officer for the status of the transition in systems
<ul style="list-style-type: none"> • Review member recruitment, selection & management strategies & tools 			http://nationalserviceresources.org/ac-startup	Check the “Building the Program: Member Development and Support” section at the NSRC for information
<ul style="list-style-type: none"> • Learn about AmeriCorps member management issues 			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
<ul style="list-style-type: none"> • 				
<ul style="list-style-type: none"> • Become familiar with AmeriCorps member orientation and training plan 				
<ul style="list-style-type: none"> • Review required background check requirements 			http://www.nationalservice.gov/for_organizations/manage/history_checks.asp	Be sure to review your program design and state requirements
<ul style="list-style-type: none"> • Review AmeriCorps member evaluation requirements 				
Specific to National Programs				
<ul style="list-style-type: none"> • Become familiar with basic AmeriCorps member benefits 			http://www.americorps.gov/for_organizations/manage/index.asp	The provisions will provide the requirements, however many programs have additional benefits for their members that vary from program to program. Check your budget
<ul style="list-style-type: none"> • Review current systems: tools used to monitor and evaluate member and project activities 			You should find an internal document, this will be unique for each organization	Many established Commissions have these tools. If these tools are unavailable, have not been developed, or you have further questions, contact your CNCS Program Officer or check the NSRC

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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"> Meet commission/parent organization staff 			Check staff list	This will vary based on where program is in regards to overall department and or organization
<ul style="list-style-type: none"> Meet sub-recipients 			Internal list	The interaction among staff at various levels varies program to program.
<ul style="list-style-type: none"> Review human resources policies 			Check with your Human Resources Department	These policies vary greatly from organization to organization.
<ul style="list-style-type: none"> Review 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"> Review staff promotion policies 			Check with your Human Resources Department	This will vary by organization
<ul style="list-style-type: none"> Review staff evaluation processes & tools 			Check with your Human Resources Department	Review previous staff evaluations and the tool that is used for staff evaluations
Specific to State Commission Executive Directors				
<ul style="list-style-type: none"> Review commissioner roles, strengths & responsibilities 			Internal list, review bios and have meetings with each	There may be unfilled vacancies
<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/board members 			Internal list	Individual meetings, conference calls or at next meeting
<ul style="list-style-type: none"> Review opportunities and strengths associated with where the Commission is housed 			This will depend on where Commission is housed	Commissions are housed in various state agencies and some are non-profit organizations
<ul style="list-style-type: none"> Review the history of the commission and past highlights 			Review strategic plans, unified state plans, meeting minutes	This varies from state to state

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Community & Site Partnerships				
• Meet CNCS: Program/Grant/Trust Officers			http://www.nationalservice.org/egrants/	This information can be found on your Notice of Grant Award
• Meet key state & local contacts			Internal database or list	Get some information about the history, individuals and partnerships to set context. Be sure to find out cultural issues of location if out of state
• Meet peer organizations & potential coaches			Check with your CNCS Program Officers for ideas You can also get lists of other national service programs in your area at http://www.cns.gov	Be sure to connect with other national service partners, Senior Corps, Learn and Serve and other AmeriCorps programs and Commissions
• Meet existing program partners/partnerships			Internal database or list	Find out some information about the history, individuals and partnerships to set context
• Review status & outcomes of previous sub-grantee/site meetings and identify items that may need to be reviewed or followed-up			Internal records and meeting minutes	This will provide information on the past and should identify necessary follow-up
• Meet media relations & key contacts			Internal database or list	Find out some information about the history, individuals and partnerships to set context this can be key for outreach and education purposes
• Learn political culture within state & local area and key contacts			Internal database or list	Find out some information about the history, individuals and partnerships to set context this can be key for outreach and education purposes
• Review sub-grantee/site project status			Internal evaluation data	The programs need to report this data annually but should be tracking it monthly or quarterly
• Review sub-grantee/site & program activity monitoring, evaluation strategy and expectations			Review contracts or agreements and cross reference with provisions and regulations	Expectations should be clear and meet all regulations and reporting requirements
• Review site visits strategy: purpose, focus, schedule, and tools			Be sure to check 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
• Review opportunities for training and support, for sub-grantees/sites			Check with your Program or Training Officer for ideas	National Service Resource Center is a good start
• Meet sub-grantees/sites			Conference calls, Program Directors meetings or trainings	
• Meet AmeriCorps members			Internal list by program	Meetings at sites, graduations, observe at service sites, invite to meetings
Specific to State Commissions				

<ul style="list-style-type: none"> • Be sure to reach out to the National Parent Organizations and the National Sites in your state. 		<p>WBRS lists all sites by state with contact information on the grantee information profiles. Also, the state profiles report lists the names of each program site in each state.</p>	<p>Even though Nationals might not be in your state, there may be a site that operates in your state.</p>
<p>Specific to National Programs</p>			
<ul style="list-style-type: none"> • Be sure to reach out to the State Commission in your state and tell your sites to reach out to the State Commissions where they operate. 		<p>You can find the information on the CNCS website under http://www.cns.gov/about/contact/statecommission.as p</p>	<p>State Commissions provide trainings and events that can connect your program staff and AmeriCorps members to national service opportunities</p>