

Checklist for New Staff of AmeriCorps Sub-Recipients:
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 National Parent or State Commission 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.
<ul style="list-style-type: none"> Review job description for all staff on grant: roles, responsibilities and specific member requirements 			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 program policy and procedures or/AmeriCorps program handbook supplied by your National Parent Organization or State Commission 			Check with your program contact at the Commission or National Parent organization	If these tools are unavailable, have not been developed, or you have further questions, contact your Commission or National Parent Organization
<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 			Your National Parent or State Commission probably has a calendar that includes all relevant deadlines.	If there is not a formal calendar, set up a meeting with your contact and review critical dates.
<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 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 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"> 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 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"> 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 about 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 the National Parent Organization or State Commission priorities 			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 			Need address	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"> 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 State Commission or National staff to make amendments if necessary. Prior approval is needed for many 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"> Review financial reporting history and requirements 			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 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 partnerships within grant application 			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"> Understand organizational policies 			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 			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"> Review 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

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Member Development & Support				
<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 mangment
<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 			Need address	AmeriCorps member management is completed in this system
<ul style="list-style-type: none"> • 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 There will be more on this in the Program and Member Management
<ul style="list-style-type: none"> • Review member recruitment, selection and retention strategies & tools 			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
<ul style="list-style-type: none"> • 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
<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 that will outline information regarding member oversight and management, this will be unique for each organization	Be sure to clarify the evaluation requirements for members as they vary by MSY type
<ul style="list-style-type: none"> • Meet members 			Review roster to identify members	Check out what their position descriptions and service activities.

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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 			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"> 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 				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 			Internal database or list	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 with your State Commission or National Parent Organization staff	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 existing program partners/partnerships and review 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 			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 			Internal database or list	Learn about the history, individuals and partnerships to set context this can be key for outreach and education purposes