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 do I look or find resources?	Hints and Tips
Program Development and Management: Program Goals, Priorities, and Strategies				
• Review Corporation for National and Community Service (CNCS) program priorities and strategic initiatives			http://www.nationalservice.gov/about/focus_areas/index.asp	Review the strategic plan and see how and where your program(s) fit
• Learn about the general history of National Service			http://www.nationalservice.gov/about/role_impact/history.asp	Learn how CNCS and its programs were created and have evolved
• 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
• Review performance measures, and create data collection plans and tools, and data reporting systems			http://www.nationalservice.gov/egrants/ http://nationalserviceresources.org/ac-startup	These are included as part of your approved grant application
• 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	This will vary program by program
• Learn about the State Commissions and National Parent Organizations that operate in your area			Locate AmeriCorps programs by state at http://www.americorps.gov/about/role_impact/state_profiles.asp; and http://www.nationalserviceresources.org/resources-specific-groups/state-commissions	Check their website sand talk to your program contacts
• Setup accounts in eGrants and MyAmeriCorps portal			http://www.nationalservice.gov/egrants/ https://my.americorps.gov/mp/login.do	eGrants is the electronic grant management system; and the MyAmeriCorps portal is the electronic member management system
• Obtain training in eGrants system			http://www.nationalservice.gov/egrants/	
• Obtain training in My AmeriCorps			https://my.americorps.gov/mp/login.do	

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Program Development and Management: Policies and Guidance				
• 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/manage/index.asp	Review ALL information
• Review Notice of Grant Award or State Commission or National Parent Organization contracting document with rules and restrictions			Review your Memorandum of Understanding, Contract or Notice of Grant Award	Review ALL information since include what is required for AmeriCorps programs and will help you to ensure compliance as you develop your program
• 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/egrants/	You will need an eGrants user name and password
• Create position description 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	Check the Resource Center for samples
• Create program policies and procedures for your program			Consult with your program contact at the State Commission or National Parent Organization; also check with the Resource Center	Most State Commissions and National Parent Organizations have these tools; contact your CNCS Program Officer, State Commission or National Parent Organization staff for assistance
• Review other AmeriCorps program related guidance			http://www.americorps.gov/for_organizations/manage/index.asp	Review the "Communications Center," and "Other Resources" on this website resources
• Review program calendar			Consult with your CNCS Program Officer, State Commission or National Parent Organization for their calendar with all relevant deadlines	Grantees should create a calendar that includes all relevant deadlines (internal and external); check the Resource Center for examples
• 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
• Review Application(s), 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

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Financial and Grants Management				
• 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/manage/index.asp	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 and fiscal staff
• Review grant funding periods (grant period, budget period, and member enrollment period)			http://www.nationalservice.gov/egrants/	The Notice of Grant Award provides these specific dates
• Review approved budget and become familiar with narrative			http://www.nationalservice.gov/egrants/	Work with your CNCS Program and Grants Officers to make amendments, if necessary; prior approval is needed for many program and budget changes
• Create tool and process that allows actual to budgeted expenses be reviewed periodically			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
• Review financial report requirements and develop policies and procedures to ensure compliance			Review the Grant Provisions and the regulations to determine requirements http://www.nationalservice.gov/egrants/	Requirements exist for both internal and external reports
• Create process to submit the Federal Financial Report (FFR) and deadlines			Grantees are required to submit the FFR in based on actual expenditures; electronic submission is made at http://www.nationalservice.gov/egrants/	The FFR is the required financial report to submit to CNCS via eGrants
• Create process to report 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
• 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
• Review grant closeout requirements, schedule, and process			Review your organization's internal policies, and review requirements at http://www.americorps.gov/for_organizations/manage/index.asp#closeout%20documents	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
• Review matching fund sources and match			Consult with your Accounting Department; and	Review committed funds not yet received and confirm

			review the approved grant application for identified match sources	commitments
•	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

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raised to date			review the approved grant application for identified match sources	commitments
• 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

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• Review organizational policies and revise or create policies to meet specific AmeriCorps requirements and functions			Consult with your Accounting Department and review existing written policies and procedures; review the list of required policies at the Resource Center http://www.nationalserviceresources.org/files/P-11_Internal_-_HO1_Policies_and_Procedures_11-15-10.pdf	List of required policies is based on CNCS and Office of Management and Budget regulations
• Understand policies, procedures, and issues related to member living allowances			CNCS regulations and Grant Provisions specify member living allowance guidelines: http://www.americorps.gov/for_organizations/manage/index.asp#provisions	If your organization operates and AmeriCorps program in more than one state, know each state's requirements related to member living allowances
• Create invoicing and reimbursement processes and deadlines			Review the Grant Provisions, and other prime grantee documents relating to these topics	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
• Identify reporting requirements and deadlines			Consult with your CNCS Program Officer and check grant documents	Timely reporting is essential for compliance

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Member Development and Support				
• Create member recruitment, selection, retention, and management tools			http://nationalserviceresources.org/ac-startup http://encorps.nationalserviceresources.org	Review the "Laying the Foundation: Member Development Plan" at the Resource Center
• Learn about AmeriCorps members' allowable activities, eligibility, benefits, supervision, recruiting, and management			http://www.americorps.gov/for_organizations/manage/index.asp#provisions	Find information on member recruitment and development at http://encorps.nationalserviceresources.org
• Become familiar with member file requirements			Review program's tools and documents related to member file management	Review other resources at http://encorps.nationalserviceresources.org/checklists_for_member_files.php
• Create AmeriCorps member orientation and training plan			http://www.nationalserviceresources.org/member-training	Consult with other programs, and the Resource Center for samples
• Create policies and procedures to meet criminal history check requirements			Review current information: http://www.nationalservice.gov/for_organizations/manage/history_checks.asp	Consult with other programs, and the Resource Center for samples; all staff and members must have a criminal history check
• Become familiar with AmeriCorps member benefits			http://www.americorps.gov/for_organizations/manage/index.asp	The Grant Provisions specify requirements; however, some programs have additional benefits for members which can vary; review budget for projected expenses
• Create AmeriCorps member evaluation requirements			http://encorps.nationalserviceresources.org/monitoring_and_evaluating_memb.php	
• Develop systems, and tools to monitor and evaluate member and project activities			Create forms and polices regarding member oversight and management http://nationalserviceresources.org/ac-startup	Review other resources at http://www.nationalserviceresources.org/member-training
• Hire Members			Create member descriptions, member contracts, and recruit new members http://nationalserviceresources.org/ac-startup	Use examples of tools; consult with other programs or State Commissions for assistance; develop member descriptions and member contracts

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Program Development and Management: Staff Supervision and Management				
• Review staff position descriptions, roles, and responsibilities			Write descriptions for all positions listed on budget or discussed in application narrative http://nationalserviceresources.org/ac-startup	If you do not have position descriptions for each position, put them on your "to do list"; check the Resource Center for samples
• Create human resources policies or amend existing policies to ensure members 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 your Human Resources Department for personnel policies and check regulations for member requirements http://www.americorps.gov/help/ac_regs/ac_regsRev.htm	These policies vary among organizations; however, specific requirements for members do exist; consult with your CNCS Program Officer, State Commission or National Parent Organization for information
• Create human resource policies			Consult with your Human Resources Department	
• Create staff support and training systems			Consult with your Human Resources Department	Create and/or review a plan for each staff
• Review staff promotion policies			Consult with your Human Resources Department	This must be consistent throughout your entire organization and not be different for AmeriCorps only
• Review staff evaluation processes and tools			Consult with your Human Resources Department	Review staff's past evaluations and the tool used to evaluate staff
• Cross train with staff			Use employee work plans to learn other job tasks	

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Community and Site Partnerships				
• Meet State Commission or National Parent Organization staff			Review grant application information and Notice of Grant Award from the prime grantee	
• Meet key state and local government contacts			Review internal database or list	Knowing the history, individuals, and partnerships is helpful to set context; understand cultural issues if programs are located out-of-state
• Meet with partnering organizations and community agencies			Check your application on what organization were included as partners then check with local groups	Consider connecting with other National Service partners, Senior Corps or Learn and Serve America programs, and other AmeriCorps programs. State Commissions, or National Parent Organizations
• 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	Consider connecting with other National Service partners, Senior Corps or Learn and Serve America programs, and other AmeriCorps programs. State Commissions, or National Parent Organizations
• Meet with existing program partners/partnerships and review contracts or Memorandums of Understanding			Internal database or list	Review information about the history, individuals, and partnerships, and compliance requirements
• Meet media relations and key contacts			Internal database or list	Review information about the history, individuals, and partnerships to set context; this can be key for outreach and education purposes
• 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; this can be key for outreach and education purposes
• Create site visit strategies for subgrantees: purpose, focus, schedule, and tools			Develop for compliance, as well as to provide assistance and identify training and technical assistance needs	A risk-based monitoring strategy will assist in efficient use of resources
• Create opportunities for training and support for subgrantees/sites			Consult with your CNCS Program Officer or Training Officer for ideas	The Resource Center is a good start

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Resources	
• **Corporation for National and Community Service (CNCS)** – This is the Federal government agency that provides funding to AmeriCorps programs	http://www.nationalservice.gov/
• **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 recruitment listings; selecting applicants and searching for applicants; and financial and progress reporting	http://www.nationalservice.gov/egrants/
• **MyAmeriCorps portal** – This resource is designed to help AmeriCorps program staff, applicants, members, and alums to perform functions using different interfaces that are linked, thereby improving access to live data and critical information; members can access their Education Awards	https://my.americorps.gov/mp/login.do
• **EnCorps** – This website is devised as a resource to support member recruitment and development	http://encorps.nationalserviceresources.org/
• **AmeriCorps Connect** – This website is designed as a resource for AmeriCorps State and National Resources, Service Projects, Member Management, Staff Resources and Training, Financial Management, CNCS News, Communications Center, and AmeriCorps Social Networks	http://www.americorpsconnect.org/
• **Resource Center** – This is a source for 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.org/