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 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 fits
• 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 State Commission or National Parent Organization staff
• Review performance measures, data collection plans and tools, and data reporting systems			Check your grant files; http://www.nationalservice.gov/egrants/ ; and http://nationalserviceresources.org/ac-startup	These are included as part of your 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 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
• 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 systems			http://www.nationalservice.gov/egrants/	
• Obtain training in MyAmeriCorps portal			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 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 can implement more restrictive requirements to assist in managing its subgrantees
• 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
• Review 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	Most State Commissions and National Parent Organizations have these tools; if these tools are not available, have not been developed, or you have questions, contact your program contact
• 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	Most State Commissions and National Parent Organizations have these tools; if these tools are not available, have not been developed, or you have questions, contact your program contact
• 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			Your State Commission or National Parent Organization probably has a calendar that includes all relevant deadlines	If there is not a formal calendar, set up a meeting with your program contact and review critical dates, then create your own calendar
• 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 State Commission or National Parent Organization for information on funding opportunities and deadlines	The requirements for submission and deadlines vary by prime grantee

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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 (project period, budget period, and member enrollment period)			Review your grant files, and http://www.nationalservice.gov/egrants/; and State Commission or National Parent Organization specific database	The Notice of Grant Award provides these specific dates; consult with your program contact for details
• Review approved budget and become familiar with narrative			Review your grant files, and http://www.nationalservice.gov/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 approval is needed for many budget changes
• 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/egrants/	Your Chart of Accounts must correlate to the approved grant budget expense line items
• 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 financial reporting history and requirements			Review your organization's internal documents and review information at http://www.nationalservice.gov/egrants/	Requirements exist for both internal and external reports
• 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
• Review partnerships connected with the grant application			These may be listed in your grant or your grant files should have a contact list	Review information about history, individuals, and partnership; grantees are responsible for overall compliance and performance even when they work with partnering organizations

• Understand organization's policies and procedures			Consult with your Accounting Department and review 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
• Review invoicing and reimbursement processes and deadlines			Review your organization's internal documents; consult with your Accounting Department, and program contact	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 program contact and check grant documents	Timely reporting is essential for compliance

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Member Development and Support				
• Review 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
• Become familiar with AmeriCorps member orientation and training plan			Review program's policies and tools and review http://www.nationalserviceresources.org/member-training	Review other resources at http://www.nationalserviceresources.org/member-training
• Review requirements for criminal history checks			Review program's policies and current information: http://www.nationalservice.gov/for_organizations/manage/history_checks.asp	
• Review AmeriCorps member evaluation requirements			Review program policies, tools, and documents	Review other resources at http://encorps.nationalserviceresources.org/monitoring_and_evaluating_memb.php
• 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
• Review systems, and tools to monitor and evaluate member and project activities			Review program's policies and tools	Review other resources at http://www.nationalserviceresources.org/member-training
• Meet AmeriCorps members			Consult internal lists by program	Review their position descriptions, service activities, and member contracts; attend meetings at sites, member graduations, observe member service projects, invite members to meetings

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Program Development and Management: Staff Supervision and Management				
• Review staff position descriptions, roles, and responsibilities			Check 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
• Review human resources policies			Consult with your Human Resources Department	
• Review 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 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				Introductions and getting to know these contacts are key to grant compliance
• 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			Consult with your State Commission or National Parent Organization contacts	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
• Review site visit strategies: purpose, focus, schedule, and tools			Review 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 sites			Consult with your State Office or National Parent Organization's contact for ideas	The Resource Center is a good start
• Meet AmeriCorps members			Consult internal lists by program	Attend meetings at sites, member graduations, observe member service projects, invite members to Commission/Board meetings

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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/