

**AmeriCorps Planning Grant Readiness Checklist 2024**

**Program:**

**Purpose:** The Planning Program Readiness Checklist identifies 10 modules for AmeriCorps program development and implementation. Contact your program officer with any questions.

**Program Officer:** TBA

**Fiscal Officer:** TBA

**Planning Grant Modules**

1. Agency Set Up
2. Grant Application Review & Rules and Regulations
3. Theory of Change, Logic Models & Performance Measures
4. Budget & Partnerships (Host Sites)
5. Member Service Agreement & Job Description
6. Member Recruitment, Eligibility and Selection
7. Member Orientation, Training and Supervision
8. Evaluation & Data Collection
9. Policies & Procedures
10. Member Files

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| **Modules** | **Required Program Documents and Trainings** | **Program Check**  **✓** |
| Pre-Grant Requirements | **Documents/Tasks** |  |
| 1. Set-up a **Litmos** Training Resources account to access AmeriCorps on-line training materials:   <https://www.nationalservice.gov/resources/litmos-training-resources> |  |
| 1. Complete the required annual **National Service Criminal History Check e-Course.**  It must be completed by all staff administering the grant. Submit course certification to ServeNebraska Staff upon completion: <https://www.nationalservice.gov/reqCHCtraining> |  |
| 1. Review Trainings through Field Print and Truescreen along with AmeriCorpswebinars: <https://www.nationalservice.gov/sites/default/files/documents/NSCHC%20Using%20Fieldprint%20and%20Truescreen.pdf>   <https://nationalservice.gov/CHCVideoLibrary> |  |
| 1. Set up accounts with **Fieldprint** and **Truescreen** ensuring that it is under the AmeriCorps agreement (Please see training manuals on the ServeNebraska portal):   <https://www.nationalservice.gov/sites/default/files/documents/NSCHC%20Using%20Fieldprint%20and%20Truescreen.pdf>  <https://nationalservice.gov/CHCVideoLibrary> |  |
| 1. Provide a copy of the agency’s liability insurance certificate. |  |
| **Module 1**  Agency Set-Up | **Documents/Tasks** |  |
| 1. Set up On3Learn account. This is a supplemental training course program to help prepare programs to run an AmeriCorps program.   [https://on3learn.digitalchalk.com/account/organizations/signup/user](https://on3learn.digitalchalk.com/account/organizations/signup/user%20)  Use the free code: **NESUB21** DO NOT PAY FOR ANY COURSES! |  |
| 1. ServeNebraska will set up an OnCorps account. OnCorps is the system for submitting financials, program progress reports and Member timesheets. |  |
| 1. eGrants – Review eGrants with program and make sure the Agency Program Leader sets up an account. |  |
| 1. Create policy and procedure for program staff timesheet – actual time must be accounted for if charging to the grant, not simply budget time. How will staff track their time to the grant? |  |
| 1. Website representation of AmeriCorps Planning grant recipient, including AmeriCorps logo and goals for development of AmeriCorps program. |  |
| **Deliverables** |  |
| 1. Provide the agency’s logo images. |  |
| 1. The agency posts AmeriCorps logo and program information on their website. |  |
| 1. Copy of staff timesheets for all staff charging time to the grant. Actual time must be accounted for if charging to the grant, not simply budgeted time. Percentage of time charged to all activities must equal 100% and must reflect budget. |  |
| **Trainings** |  |
| 1. On3Learn Video: AmeriCorps 101 for Staff |  |
| 1. A Brief History of National Service Video: <https://www.youtube.com/watch?v=0WFfqYAndrU> |  |
| 1. Schedule a virtual/in-person meeting with assigned ServeNebraska Program Officer. |  |
| 1. Schedule a budget/timekeeping meeting with assigned ServeNebraska Fiscal Officer Set up budget in OnCorps. |  |
| **Module 2**  Grant Application Review  &  AmeriCorps Rules and Regulations | **Documents/Tasks** |  |
| 1. Review the agency’s submitted grant application and budget. |  |
| 1. Review the most current Specific Terms and Conditions for AmeriCorps State and National Grants. |  |
| 1. Review the most current General Terms and Conditions for AmeriCorps State and National Grants. |  |
| 1. Review the Notice of Funding Opportunity issued by ServeNebraska. |  |
| 1. Read the AmeriCorps Prohibited and unallowable activities. |  |
| **Deliverables** |  |
| None |  |
| **Questions** |  |
| 1. What are the problems/needs you plan to address? 2. What is the data that supports the existence of this problem? Specific, recent, local data is best. 3. Determine how your community will benefit from the proposed program. 4. Identify the Intervention to be delivered by your members and/or community volunteers (Activities: what is done, with whom, and at what dosage). 5. Is the problem/need intervention in one of the AmeriCorps priority areas? If so, which one? |  |
| **Trainings** |  |
| 1. Program Officer Call - Training will focus on review of agency grant, budget and AmeriCorps Terms & Conditions. |  |
| **Module 3**  Theory of Change, Logic Models  &  Performance Measures | **Documents/Tasks** |  |
| 1. Research evidence-based and evidence informed models to support your Logic Model and Performance Measures. |  |
| 1. Review Logic Model instructions. |  |
| 1. Complete the Logic Model template. |  |
| 1. Determine which national Performance Measures (PM) you will use for your program (ensure you have at least one output, one intermediate, and one end Outcome). |  |
| 1. Complete the Performance Measure Template. |  |
| 1. Create Performance Measure Data Collection and Review Plan: To ensures the program collects, analyzes and used valid program data to inform progress towards meeting performance measurement targets, processes are in place to effectively gather and handle data. |  |
| **Deliverables** |  |
| 1. Create a draft of a Logic Model and proposed Performance Measures and share with your Program Officer. |  |
| **Questions** |  |
| 1. Have you developed performance measures for your program? 2. What data collection instruments will you use to measure the impact of your program? 3. Do you have a procedure for gathering data from members/partner sites? 4. Is the Problem/Need Intervention in one of the AmeriCorps priority areas? If so, which one? |  |
| **Trainings** |  |
| 1. On3Learn Video: Developing and Integrating Logic Models |  |
| 1. On3Learn Video: Selecting and Developing Performance Measurements |  |
| 1. Program Officer Call |  |
| **Module 4**  Budget  &  Partnerships (Host Sites) | **Documents/Tasks** |  |
| 1. Develop a budget that adequately accounts for all activities. |  |
| 1. Determine what AmeriCorps service gear will be provided to members. |  |
| 1. Account for all staffing related to the AmeriCorps program in your budget (both federal or grantee share). |  |
| 1. Make sure that commonly overlooked costs are included, as appropriate in your budget:  * Background checks for staff and members * Worker’s Compensation * Unemployment insurance * Travel for members to training events * Staff professional development * Training for site supervisor * Health care costs for FT members |  |
| 1. Ensure that you can meet the match requirements. |  |
| 1. Ensure the federal request falls within maximum cost per MSY range. |  |
| 1. Ensure that the member living allowance is within the allowable range. |  |
| 1. Develop a system for monitoring and tracking financial aspects of the program including:  * Separate AmeriCorps records by grant year * Document actual expenses/match, not budgeted amounts * Ensure that unemployment is not paid for members * Withhold income tax and FICA from member living allowance * Cover members in worker’s compensation plan * Distribute living allowance evenly and not on an hourly basis |  |
| 1. Develop plan for accounting changes required to manage AmeriCorps resources (stipends, member insurance, etc.). |  |
| 1. Create host site application and selection process (if applicable). |  |
| **Deliverables** |  |
| 1. Discuss and share a draft of the budget with your program officer. |  |
| **Trainings** |  |
| 1. On3Learn Video: Understanding the AmeriCorps Budget |  |
| 1. Program Officer Call. |  |
| **Module 5**  Member Service Agreement  &  Job Description | **Documents/Tasks** |  |
| 1. Develop a **Member Position Description** (A template provided on the ServeNebraska Portal) – It must be attached as an addendum or included in the member service agreement. Activities must align with those described in grant application. The position description includes:  * AmeriCorps Position Title * Term of service (position type, when commitment starts and ends) * Time requirements (how many hours must be completed, slot type of member, how many hours per/week) * Location(s) of service * Description of duties * Areas of responsibility * Essential functions * Marginal functions * Qualifications/Characteristics |  |
| 1. Develop **a Member Service Agreement** (Programs must use the yearly updated ServeNebraska Service Agreement template). The Service Agreement includes the following, and should be reviewed with members upon signing the of the document:  * Member start and end dates for contracted term of service, not to fall outside the grant start and end dates**. The start date indicated on the service agreement must match the start date entered in eGrants for the member.** * Amount and distribution of living allowance * The minimum number of service hours (as required by statute) and other requirements (as developed by recipient) necessary to successfully complete the term of service and to be eligible for the education award * The amount of the education award being offered for successful completion of the term of service * Standards of conduct, as developed by the program * Prohibited activities and unallowable activities * Requirements under the Drug-Free Workplace Act * Civil rights requirements, complaint procedures, and rights of beneficiaries * Suspension and termination rules * Circumstances under which a member may be released for cause * Grievance procedures and process * Other requirements established by the program * Member signature and date * Program manager signature and date. Note: The program should ensure that member service agreement is signed and dated by the member and program staff before commencement of service. |  |
| 1. Create staff position descriptions (staff associated to grant/budget). |  |
| **Deliverables** |  |
| 1. Provide a draft of the Member position description (must clarify if using ServeNebraska template). |  |
| 1. Provide a draft of the Member Service Agreement **(must use the yearly Service Agreement Template provided on the ServeNebraska portal**). |  |
| **Questions** |  |
| 1. Have you described the AmeriCorps member structure? How many? Full time/half time/etc. 2. What is your time frame for the structure/program design (12-month, 11-month, academic year, etc.)? 3. Have you determined what AmeriCorps service gear will be provided to members and the cost of that gear? 4. Have you accounted for all staffing related to the AmeriCorps program in your budget in the federal and/or grantee share)? 5. Does the total federal request fall within allowable maximum per MSY range? |  |
| **Trainings** |  |
| 1. Litmos Webinar: AmeriCorps State and National Prohibited Activities |  |
| 1. Program Officer Call |  |
| **Module 6**  Member Recruitment, Eligibility & Selection | **Documents/Tasks** |  |
| 1. Develop a member recruitment plan. |  |
| 1. Create application materials to use in recruitment:  * Determine if you will operate a pre-application outside of the member portal and if so, create it. * If you are officially awarded an operational grant by AmeriCorps, register the program on the AmeriCorps national recruitment page at [www.my.americorps.gov](http://www.my.americorps.gov) * Create AmeriCorps member application - Recommend using My AmeriCorps portal (online) application (see instructions on ServeNebraska portal) |  |
| 1. Develop a member screening/interview process. |  |
| 1. Build procedure for conducting member and staff National Service Criminal History Checks (NSCHC). |  |
| 1. Develop procedures to obtain necessary documentation for:  * Background checks * Health care enrollment / Waiver * Publicity release * Proof of meeting citizenship requirements * Tax forms |  |
| 1. Review CNCS National Service Criminal History Introductory information:   <https://www.nationalservice.gov/resources/criminal-history-check> |  |
| 1. Develop policies and procedures for the following:  * Parental Consent-process secure for parental consent for all prospective members under the age of 18 * Allow members to serve on jury duty or Armed Forces Reserved with no penalty * Allow member who experience birth of child, placement of foster child through foster care or adoption or serious illness (member or immediate family) to take FMLA (If applicable. Only applies to members who have successfully completed a full year of service, serve with the same sponsor for a subsequent term, were assigned to the same sponsor for at least 1,250 hours for the previous tem, and serve with a sponsor with 50 or more employees) * Compelling Personal Circumstances, which must be approved by ServeNebraska * Personal Identifiable Information * Health Care enrollment (if applicable) * System for living allowance distribution. * Time and activity tracking and reporting * Develop member selection process (flowchart) including the role that sites and site supervisors play in selection * Develop member acceptance and rejection letter/email |  |
| 1. Develop systems for eligibility and documentation requirements. |  |
| **Deliverables** |  |
| 1. Provide a draft of the member application, AmeriCorps policies and procedures, interview questions and criminal history procedures. |  |
| **Trainings** |  |
| 1. On3Learn Video: AmeriCorps Member Eligibility |  |
| 1. On3Learn Video: AmeriCorps Member Enrollment and Exit |  |
| 1. Program Officer Call |  |
| **Module 7**  Member Orientation, Training & Supervision | **Documents/Tasks** |  |
| 1. Create a member pre-service orientation outline that includes at least the following:  * AmeriCorps 101 * Rights and responsibilities * Code of Conduct * AmeriCorps program policies/procedures * Prohibited and unallowable activities * Drug Free Workplace * Suspension/termination * Sexual harassment and discrimination * History of National Service * Three streams of AmeriCorps service * Role of ServeNebraska * Recording service hours * Data collection and reporting * Mandatory reporting requirements * Program goals and objectives * Review of member service agreement and position description * Review of member benefits (including living allowance, education healthcare, childcare - if applicable) * Progressive discipline process * Benefits of serving as an AmeriCorps member |  |
| 1. Create a plan for providing training throughout the program year. |  |
| 1. Identify specific training needs for your members related to their service (Child development, financial literacy, etc.). |  |
| 1. Develop a member learning and development training calendar. |  |
| 1. Create a plan to bring members together regularly. |  |
| 1. Develop the evaluation for members (mid-year and end of term). |  |
| 1. Develop a list of responsibilities for the site supervisor. |  |
| 1. Member supervision plan overview:    * Communication channels and expectations between program staff, members and placement sites.    * AmeriCorps branding/identification requirements; online branding and linkage (see ServeNebraska Branding policy).    * Program calendar covering project timeline including: national days of service, community events, holidays, training and recognition ceremonies.    * Review of safety plans and emergency procedures for your placement sites, including Continuity of Operations Plan (COOP).    * Member Ongoing Training plan, including training calendar.    * Formally acknowledge AmeriCorps commitment through swearing-in ceremony with the AmeriCorps Oath. |  |
| 1. Develop Member Ongoing Training/Development Plan including:    * Core training required to equip members with basic knowledge and skills needed before and throughout service    * On-going training throughout the service term to equip members and develop members (all training should be in a member training calendar)    * Training that will assist members in their transition from AmeriCorps positions and Life After AmeriCorps |  |
| 1. Create policy and procedure for reviewing and approving member timesheets:  * Entry of hours into My Service Log are accurate-Service hours, training hours (not to exceed 20% of total hours for service term), Fundraising hours (applicable only with approved fundraising performance measure). * Each entry has a description and is accurate to member activities. * Signatures and dates of member and supervisor. |  |
| **Deliverables** |  |
| 1. Review Member File Checklist (see ServeNebraska portal). |  |
| 1. Policy and procedure for reviewing and approving member timesheets. |  |
| 1. Complete the AmeriCorps Member Training form (located on ServeNebraska’s portal). |  |
| **Questions** |  |
| 1. Do you have plans for bringing the members together regularly? 2. Have you identified specific training needs for your members, related to their service site (child development, construction, financial literacy education)? What are these needs? |  |
| **Trainings** |  |
| 1. On3Learn Video: AmeriCorps Member Eligibility |  |
| 1. Program Officer Call |  |
| **Module 8**  Evaluation & Data Collection | **Documents/Tasks** |  |
| 1. Discuss what instrument you might use to measure the impact of your program. |  |
| 1. Review the Performance Measures (PM) you selected for your program. Make sure you have at least one output, one intermediate, and one end outcome PM. |  |
| 1. Finalize which national performance Measure you will be using. |  |
| 1. Select the tools you will use to collect your Performance Measure data. |  |
| 1. Create a data collection plan that accounts for how you will ensure high data quality reporting. |  |
| 1. Identify all data points needed for collections and build the systems in order to do so. |  |
| 1. Plan for and develop data integrity training as part of your member and host site orientations. |  |
| 1. Outline a plan to ensure ongoing data integrity and storage as required by AmeriCorps, such as a Personally Identifiable INFORMATION (PII) Breach policy. |  |
| **Deliverables** |  |
| 1. Provide an explanation to the program officer of the approach to evaluation and data collection. |  |
| **Trainings** |  |
| 1. Program Officer Call |  |
| **Module 9**  *Policies & Procedures* | **Documents/Tasks** |  |
| 1. Develop Orientation and Training Plan for Site Supervisors, Agency Staff (including fiscal and program staff) including:    * AmeriCorps grant requirements, program design, policies, prohibited and unallowable activities, performance measures, data collection procedures, reporting processes and deadlines, member training plan    * Site supervisor training includes: member supervision expectations, timesheet monitoring and approval, disciplinary policies and procedures, member performance evaluations    * Communication procedures and expectations    * Monitoring process to ensure that partners/host site/placement sites fulfill and meet agreements or obligations.    * AmeriCorps branding/identification requirements (ServeNebraska Branding Policy) |  |
| 1. Identify member uniform/gear. |  |
| 1. Create member pre-service orientation agendas and materials. |  |
| 1. Create site supervisor orientation agendas and materials. |  |
| 1. Create and copy the member handbook. |  |
| 1. Create and copy site supervisor handbook. |  |
| **Deliverables** |  |
| 1. Provide the final copy of the Orientation and Training Plan. |  |
| **Questions** |  |
| 1. Do you understand the AmeriCorps grant requirements and have a plan to train members? 2. Do you understand the branding/identification requirements for member gear and signage at the Member serving site? |  |
| **Trainings** |  |
| 1. Program Officer Call |  |
| **Module 10**  Member Files | **Documents/Tasks** |  |
| 1. Review Member File Checklist (see ServeNebraska portal for templates). |  |
| 1. Develop and copy member file forms including:    * Healthcare acceptance/waiver (if FT members)    * Childcare acceptance/waiver (if FT members)    * Previous Service Term Check    * W-4    * I-9    * Agency required forms    * NSCHC Verification forms |  |
| 1. Develop on-boarding process system. |  |
| **Deliverables** |  |
| 1. Do you have a procedure developed for when to suspend members (for cause, for serving no hours during a pay period, etc.)? |  |
| **Trainings** |  |
| 1. On3Learn Video: AmeriCorps Member Files for Staff |  |
| **Planning Grant Wrap Up Requirements** | **Documents/Tasks** |  |
| TBA |  |
| **Deliverables** |  |
| TBA |  |
| **Trainings** |  |
| TBA |  |

December 28, 2023