AmeriCorps State Formula Planning Grants

August 2023-July 2024

**Important Dates**

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| **Date** | **Topic** | **Location or Link** |
| August 10  | Orientation | [**Zoom Webinar**](https://ofm-wa-gov.zoom.us/j/2557239372?pwd=UGRPTXRKdS9PQzBJb050eXBlMUdRdz09) |
| September 14  | Fiscal Orientation and Program Design | [**Zoom Webinar**](https://ofm-wa-gov.zoom.us/j/2557239372?pwd=UGRPTXRKdS9PQzBJb050eXBlMUdRdz09) |
| October 12  | Theory of Change and Evidence | [**Zoom Webinar**](https://ofm-wa-gov.zoom.us/j/2557239372?pwd=UGRPTXRKdS9PQzBJb050eXBlMUdRdz09) |
| November 9  | Logic Models, Performance Measurement, and Data Collection | [**Zoom Webinar**](https://ofm-wa-gov.zoom.us/j/2557239372?pwd=UGRPTXRKdS9PQzBJb050eXBlMUdRdz09) |
| December 14  | Policies, Procedures, and Branding | [**Zoom Webinar**](https://ofm-wa-gov.zoom.us/j/2557239372?pwd=UGRPTXRKdS9PQzBJb050eXBlMUdRdz09) |
| January 11  | Grant Making, Budgeting, and Fund Development | [**Zoom Webinar**](https://ofm-wa-gov.zoom.us/j/2557239372?pwd=UGRPTXRKdS9PQzBJb050eXBlMUdRdz09) |
| February 8  | Member Benefits, Eligibility, and National Service Criminal History Checks | [**Zoom Webinar**](https://ofm-wa-gov.zoom.us/j/2557239372?pwd=UGRPTXRKdS9PQzBJb050eXBlMUdRdz09) |
| March 14  | Recruitment and Enrollment | [**Zoom Webinar**](https://ofm-wa-gov.zoom.us/j/2557239372?pwd=UGRPTXRKdS9PQzBJb050eXBlMUdRdz09) |
| April 11  | Member Files and Required Documents | [**Zoom Webinar**](https://ofm-wa-gov.zoom.us/j/2557239372?pwd=UGRPTXRKdS9PQzBJb050eXBlMUdRdz09) |
| **April 24-25**  | **In-Person Regional Training Conference** | **Minneapolis, MN** |
| May 9  | Designing your Calendars | [**Zoom Webinar**](https://ofm-wa-gov.zoom.us/j/2557239372?pwd=UGRPTXRKdS9PQzBJb050eXBlMUdRdz09) |
| June 13  | Reporting, Record Retention, and Closeouts | [**Zoom Webinar**](https://ofm-wa-gov.zoom.us/j/2557239372?pwd=UGRPTXRKdS9PQzBJb050eXBlMUdRdz09) |
| July 11  | Closeout and Final Thoughts | [**Zoom Webinar**](https://ofm-wa-gov.zoom.us/j/2557239372?pwd=UGRPTXRKdS9PQzBJb050eXBlMUdRdz09) |
| **July 17-18** | **In-Person Subgrantee Meeting** | **Olympia, WA** |

Webinars are on the second Thursdays of each month from **10:00 – 12:00**.

Zoom links are imbedded above and have been sent as a meeting invite.

Monthly individual calls will also be held with Serve Washington.

**Orientation and Kickoff – August**

[ ]  **Virtual** **Orientation** – General Overview of AmeriCorps in WA and Introduction to AmeriCorps 101

[ ]  Begin Locating/Reviewing/Reading AmeriCorps Guidance

[ ]  [National and Community Service Act of 1990 as amended by the Serve America Act](https://www.americorps.gov/sites/default/files/document/YYYY_MM_DD_National_Community_Service_Act_Of_1990_as_Amended_by_the_Serve_America_Act_ASN.pdf) (42 U.S.C. § 12501 et seq.)

[ ]  [CNCS Code of Federal Regulations](https://www.ecfr.gov/cgi-bin/text-idx?SID=300ac34a0b04f230a81df5e462cf5152&mc=true&tpl=/ecfrbrowse/Title45/45chapterXXV.tpl) (45 C.F.R. § 2500.1 et seq.)

[ ]  [OMB Code of Federal Regulations](https://www.ecfr.gov/cgi-bin/text-idx?SID=6f4e37a49efec425d7b1d2debb1d5f51&mc=true&tpl=/ecfrbrowse/Title02/2chapterII.tpl) (2 C.F.R. § 200 et seq.)

[ ]  [AmeriCorps Terms/Conditions for AmeriCorps State and National Grants](https://servewashington.wa.gov/programs/americorps/subgrantee-resources/additional-resources)

[ ]  [Serve Washington Special Terms/Conditions](https://servewashington.wa.gov/programs/americorps/subgrantee-resources/additional-resources)

[ ]  [**Serve Washington Planning Terms/Conditions**](https://servewashington.wa.gov/programs/americorps/subgrantee-resources/additional-resources)

[ ]  [**Serve Washington Program Handbook**](https://servewashington.wa.gov/programs/americorps/subgrantee-resources/americorps-program-handbook)

**Quarter 1 – September – November**

**September**

☐ **Webinar – Fiscal Orientation and Introduction to Program Design**

[ ]  Begin thinking about community need

☐ Begin thinking about organizational and staffing needs/structure

☐ Begin thinking about what service type, term length, and slot types

[x]  **If Applying to Competitive RFGA, Read Operational RFGA and join the TTA Webinar**

*Most new programs apply to the formula competition in the Spring. Talk to Jenny if you are interested in the competitive competition*

**October**

**Webinar – Theory of Change and Evidence**

[ ]  Begin Developing a Theory of Change

[ ]  Identify Evidence to support the Theory of Change Framework

[ ]  **If Applying to RFGA Submit Operational Application**

*Most new programs apply to the formula competition in the Spring. Talk to Jenny if you are interested in the competitive competition*

**November**

☐ **Webinar – Logic Model, Performance Measures, and Data Collection**

[ ]  Begin Developing a Logic Model

☐ Review AmeriCorps Performance Measure Instructions

☐ Begin Developing One Aligned Performance Measure (one output, one outcome)

☐ Begin Developing a Data Collection Plan

**Quarter 1 – Deliverables**

[ ]  Theory of Change Framework and Logic Model

[ ]  Performance Measure(s) and Data Collection Plan

[ ]  Operational Grant Application (submitted in eGrants), if applicable

**Quarter 1 – Questions to Consider**

*Is there alignment between need, intervention, and intended outcome? Clear design/dosage?*

*What level of evidence supports this alignment?*

*Which aspects of your program are best measured annually?*

*How many AmeriCorps members will be needed? Are the member activities allowable?*

*What are the characteristics and qualifications of desired AmeriCorps members?*

*How many staff members and what roles will be supporting the program and members?*

*Are partner agreements necessary for data collection? How will members be oriented to data collection?*

*What checks and balances will be needed to ensure fidelity in data collection?*

*Will you have host sites? What other partners are necessary to be successful?*

*How will you obtain the cash match necessary to operate the program?*

**Quarter 2 – December - January**

**December**

[ ]  **Webinar – Policies & Procedures, Volunteer Plan, and Branding**

[ ]  Begin Developing AmeriCorps Policies and Procedures (not covered by organizational policies and procedures)

[ ]  Identify Volunteer Plan (recruitment, training, support, data collection/reporting)

[ ]  Develop a Plan for Branding (or co-branding) your program

[ ]  Update Budget Framework

**January**

[ ]  **Webinar – Grantmaking, Budgeting and Fund Development**

[ ]  Identify Host Sites or process for (if applicable)

[ ]  Identify Strategic Partners (if applicable)

[ ]  Begin Budget Framework

**February**

[ ]  **Webinar** **– Benefits, Eligibility, and National Service Criminal History Checks**

[ ]  Take the AmeriCorps eCourse on NSCHC (save certification)

[ ]  Ensure Fiscal Systems are in place to support Member Benefits

[ ]  Begin Developing Systems for Processing and Documenting Eligibility

[ ]  Update Budget Framework

[ ]  **Read Operational RFGA**

[ ]  **If Applying to RFGA, attend TTA Webinar**

**Quarter 2 – Deliverables**

[ ]  Submit NSCHC Policy & Procedure

[ ]  Submit NSCHC Certification

[ ]  Establish Truescreen and Fieldprint Accounts

**Quarter 2 – Questions to Consider**

*Does the program have a criminal history check policy that meets AmeriCorps requirements?*

*Will members be allowed to teleserve? Does the teleservice policy meet AmeriCorps requirements?*

*Is volunteer engagement a program component? What activities will volunteers be engaged in?*

*What “gear” will be provided to AmeriCorps member?*

*How will the program educate the community and potential service recipients on availability of services?*

*How will the program educate local leaders, state/congressional delegates, and other VIPs on the value of AmeriCorps?*

*How will the program ensure a diverse and inclusive AmeriCorps team?*

**Quarter 3 – March - May**

**March**

[ ]  **Webinar – Recruitment, Enrollment, and Retention**

[ ]  Develop member Position Descriptions to guide recruitment efforts

[ ]  Develop a member recruitment and selection process (if using host sites, also develop a host site recruitment and selection process)

[ ]  Develop procedures and tools for AmeriCorps enrollment process

[ ]  Develop retention strategy

[ ]  Update Budget Framework

**April**

[ ]  **Webinar – Member Support and Development and Designing Your Calendar**

[ ]  Begin Developing a Member Supervision Plan (if using Host Sites, develop a Host Site Monitoring Plan

[ ]  Begin Developing a Member Orientation/Training Plan

[ ]  Prepare for how your program will engage in National Days of Service

[ ]  Prepare for how your program will engage in National Days of Service and Serve WA events/initiatives

[ ]  Update Budget Framework

**May**

[ ]  **Webinar – Member Files and Required Documentation**

[ ]  Develop Member Position Description(s)

[ ]  Develop Member Service Agreement(s) (if using Host Sites, develop agreement)

[ ]  Develop Member Time Tracking System

[ ]  Develop a Checklist for Member Files

[ ]  Develop a Member Performance Review process

[ ]  Update Budget Framework

**Quarter 3 – Deliverables**

[ ]  Establish Truescreen and Fieldprint Accounts

[ ]  Successfully Adjudicate and Document Truescreen and Fieldprint checks on staff that will charge time to the grant

[ ]  Member Recruitment Plan

[ ]  Member Orientation/Training/Supervision Plan (Host Site, too, if applicable)

[ ]  Member Position Description/Member Service Agreement

[ ]  Timesheet/Time Tracking Tools

[ ]  **If Applying to RFGA, Submit Operational Application**

**Quarter 3 – Questions to Consider**

*Are position descriptions free of prohibited activities and perception of “other duties?”*

*How will programs promote service opportunities?*

*What process or system will be used for member applications?*

*What information is needed on applications?*

*What will selection criteria be? Does this cause barriers for anyone to serve?*

*How will the member service agreement be introduced (and signed on or before the first day of service)?*

*How will the program encourage esprit de corps among the AmeriCorps team?*

*How will the program prepare AmeriCorps members for Life After AmeriCorps?*

*If using host sites, what role will they have in member development?*

*How will service in the program provide professional and workforce development for members?*

*Are their any certifications that members can get during their term of service?*

*How will programs ensure members are aware of prohibited activities and program requirements?*

*Is the time tracking system paper or electronic? If electronic, does it meet AmeriCorps requirements?*

*Does the program have a criminal history check policy that meets AmeriCorps requirements?*

*Where will records be stored? Who will manage records retention?*

*How does this new knowledge change the budget/match in order to run a successful program?*

**Quarter 4 – June – August**

**June**

[ ]  **Webinar – Reporting, Records Retention, Close-Out Process**

[ ]  Continue Unfinished Objectives

[ ]  Finalize Budget Framework

**July**

[ ]  **Attend Serve WA Annual Subgrantee Meeting, if applicable** (required if funded for operational grant)

[ ]  Finalize Unfinished Objectives

**August**

[ ]  **Planning Grant Closeout**

[ ]  Finalize Unfinished Objectives

**Quarter 4 – Deliverables**

[ ]  Final Invoice

[ ]  Final FFR

[ ]  Close-Out Form

