**(Sample Template)**

**AmeriCorps Program**

**AmeriCorps Director Transition & Orientation Plan**

**AmeriCorps Director Transition Procedures**

In the event of a transition in the [Program Name] Program’s AmeriCorps Director, program oversight will continue to be the task of the legal applicant. Legal applicant representative name: [Legal Applicant Representative Name] .

Until a new AmeriCorps Director is identified, program management will be assumed by the legal applicant representative and/or his/her designee. The legal applicant representative will take on the duties specific to everyday member management and training.

**AmeriCorps Director Orientation Plan**

The following orientation plan introduces the [Program Name] AmeriCorps Director to:

* Legal applicant organization and its AmeriCorps program
* CaliforniaVolunteers (CV) [www.californiavolunteers.org](http://www.californiavolunteers.org)
* CaliforniaVolunteers AmeriCorps Standards
* CaliforniaVolunteers Policies
* CaliforniaVolunteers Monitoring Procedures
* AmeriCorps Federal Regulations and Provisions <http://www.nationalservice.gov/build-your-capacity/grants/managing-americorps-grants>
* The Corporation for National and Community Service (CNCS) <http://www.nationalservice.gov/>

**Day 1**

* Review Legal Applicant AmeriCorps Goals & Mission
* Review AmeriCorps Director Job Description and Program Vision
* Review AmeriCorps Program Contract
* Review Performance Measurement Worksheets (PMWs)
* Review Operational Calendar (provided by CV Program Officer)

**Day 2**

* Contact CV Program Officer to introduce yourself and obtain updates. Update the AmeriCorps Program Contact Change Form and eGrants User Forms. These forms are available on CaliforniaVolunteers’ website.
* Work with your CV Program Officer to identify additional components for your program’s AmeriCorps Director Transition & Orientation Plan
* Review ***Building a High Quality AmeriCorps Program (Building) Start-up Guide:***

[*http://www.nationalservice.gov/resources/americorps/building-high-quality-americorps-program-blueprint-implementation-new-program*](http://www.nationalservice.gov/resources/americorps/building-high-quality-americorps-program-blueprint-implementation-new-program)

* + P.252-254 : Brief History of National Service
  + P. 255-256 : Corporation for National and Community Service Programs
  + P. 262 : AmeriCorps: Just the Facts
  + P. 263 : Useful Online Resources: TO DO: Visit each site and save in

Browser’s bookmarks or favorites

* P.12 : AmeriCorps Required Documents
* P.15-23 : Important AmeriCorps Components
* P. 30-33 : eGrants & MyAmeriCorps Portal
* Consult program’s ***eGrants*** Administrator to gain access to ***eGrants*** to review the **MyAmeriCorps Portal** components. Note: The Employer Identification Number (EIN#) will be needed to obtain an ***eGrants*** account. If available, consult the program’s ***eGrants*** Manual for step-by-step instructions to navigating the system.

Once eGrants/MyAmeriCorps Portal access has been granted consult the MyAmeriCorps ***AmeriCorps Grantee User Help*** Tutorials to learn how to navigate the system.

Link:<https://my.americorps.gov/trust/help/grantee/My_AmeriCorps_Grantee_Help.htm#%3E%3Epan=2>

* Carefully review Member Enrollment, Exit, and Slot Conversion Procedures. **Be sure to fully understand the 30 day enrollment/exit requirements.** If necessary consult with your CV Program Officer.

**Day 3**

* Review **Building a High Quality AmeriCorps Program (Building) Start-up Guide**

[*http://www.nationalserviceresources.org/americorps-building-high-quality-americorps-program-blueprint-implementation-new-program-start-guide*](http://www.nationalserviceresources.org/americorps-building-high-quality-americorps-program-blueprint-implementation-new-program-start-guide)

* + P.71 : Community & Site Partnerships
  + P.72 : Building Community Partnerships
  + P.74 : Partnership Roles and Responsibilities
  + P.75 : Creating a Memorandum of Understanding
  + P.106-221 :4-6 Months: Community & Site Partnerships
    - Pay attention to sections on: Site Monitoring Visits, Site Visit Procedures, Desk Audit Tools, and Member Files Desk Audit
* Review **Building a High Quality AmeriCorps Program (Building) Start-up Guide**
  + P.79-97 : Tools for Success
* Review **Building a High Quality AmeriCorps Program (Building) Start-up Guide**
  + P.97-106 : Member Development & Support
  + P.106-113 : Tools for Success

**Day 5**

* Review **Building a High Quality AmeriCorps Program (Building) Start-up Guide**
  + P.114-124 : Finance & Grants Management
  + P.125-134 : Review the Tools for Success
* Review **Building a High Quality AmeriCorps Program (Building) Start-up Guide**
  + P.186-198 : *0-3 Months: Financial & Grants Management*
    - Pay special attention to sections on Monthly Budget Review, Financial Reporting, and Member Enrollment & Attendance.

**Day 6**

* Review **Building a High Quality AmeriCorps Program (Building) Start-up Guide**
  + P.225-235 : *4-6 Months: Member Development & Support*
  + P.242 : Principles of Continuous Improvement
  + P.243-246 : *10-12 Months: Maintaining The Program*
    - Pay special attention to Final Progress Reporting & Exiting Members in My AmeriCorps

**Day 7**

* Review CV Management Resources on its Managing California AmeriCorps Grants webpage: <http://www.californiavolunteers.org/index.php/AmeriCorps/detail2/>
  + Resource Documents, Regulations and Provisions
* Review CV Policies: <http://www.californiavolunteers.org/index.php/AmeriCorps/detail2/>
* Review the sample Progress Report
  + Contact CV Program Officer for latest version

**Template Note:** Programs are encouraged to use this template as a basic template in the development of an AmeriCorps Director/Coordinator Transition Plan that meets its operational needs and addresses AmeriCorps implementation requirements.