

Grant Review Score sheet

Applicant:

Reviewer:

Scoring

0	-	Did not meet the expectation/ Requirement
1	-	Met the requirement/expectation
2	-	Met expectation and has demonstrated positive experience

Conflict of Interest and Confidentiality Issues

AmeriCorps Grant Award Review Process

Thank you for volunteering for the Grant Review Workgroup. This is a big responsibility and it is vital we provide the most thorough possible evaluation to ensure we put forward the strongest applicants we have from our state. The Grant Review Workgroup will be reviewing all new, reCompleting, and continuation grant applicants.

Your designation as a Grant Review Member requires you be fully aware of policies regarding conflict of interest and the privileged nature of the applications.

Conflict of Interest

Prior to reviewing any proposals, you must inform the Governor's Office of Community Service (Governor's OCS) of any potential conflicts of interest or appearances thereof. If you become aware of any potential conflict of interest as you review an application, you must immediately notify a Governor's OCS representative. Examples of potentially biasing affiliations or relationships are listed below. The Governor's OCS will determine how to handle any appearances of or actual conflicts of interest and will inform you regarding what further steps, if any, to take.

Note: Grant Review Members should review these possible conflicts prior to the review process and sign the Conflict of Interests statement.

A conflict of interest or the appearance of a conflict may occur if you are directly or indirectly affiliated with an organization that has submitted a grant proposal for this review. As a reviewer, you must inform the Governor's OCS of any such potential conflicts. Examples of affiliations that may constitute conflicts could include any of the following:

1. Your personal submission of an application to the Governor's OCS or the Corporation for National and Community Service. If you have submitted an application, or have been personally involved in the preparation of an AmeriCorps State application.

2. Affiliation with an applicant institution. A conflict may be present if you have/hold:

- Current employment or are being considered for employment, at the institution or a consulting, advisory, or other similar position.
- Any formal or informal employment arrangement with the institution.
- Current membership on a visiting committee, board, or similar body at the institution.
- Ownership of the institution's securities or other evidences of debt. (Minor or indirect holdings are not considered conflicts.)
- Any office, governing board membership, or relevant committee chairpersonship in the institution. (Ordinary membership in a professional society or association is not considered an office.)
- Current enrollment as a student. (This is only a conflict for proposals or application that originate from a department or school in which one is a student.)
- Received and retained an honorarium or award from the institution within the last 12 months.

3. Relationship with someone who has personal interest in the proposal or other application.

- Related by marriage or through family membership.
- Business or professional partnership.
- Employment at the same institution within the last 12 months.
- Past or present association as thesis advisor or thesis student.
- Collaboration on a project or on a book, article, report, or paper within the last 48 months.

4. Other affiliations or relationships.

- Interests of the following persons are to be treated as if they were yours: Any affiliation or relationship of your spouse, your minor child, a relative living in you immediate household, or anyone who is legally your partner that you are aware of would be covered by Section 1, 2, or 3 of this Statement (except for receipt by your spouse or relative of any honorarium or award).
- Any other relationship, such as close personal friendship, you think might tend to affect your judgment or be seen as doing so by a reasonable person familiar with the relationship.

Confidentiality of Applications

Grant Review Members are given access to information about applicants for use only during the evaluation process and for discussion with fellow Grant Review Members and the Governor’s OCS personnel. Therefore, you must not use information for your personal benefit or make it available for the benefit of any other individual or organization. You may, however, share any general information about the Governor’s OCS and the Corporation for National and Community Service. (All applications should be returned to Governor’s OCS staff at the conclusion of the review process.)

I have read the information regarding Conflict of Interest included in the AmeriCorps Grant Review Instructions and understand that I must contact the appropriate Office of Community Service official if a conflict arises during my term of service as a reviewer. I also will not divulge any confidential information I may become aware of during my term.

Name (Print Please): _____

Signature: _____

Review Panel: _____

Instructions for Scoring Applications

The Grant Review Workgroup role is critical to ensuring the selection of high-quality grant proposals. As a Grant Reviewer your primary responsibility is to read grant applications, review them for quality, and reach consensus on proposal quality with your fellow review members. Here are some of the key elements we want you to keep in mind as you begin the review process:

Assign scores based on given criteria in the RFP and 2011 Corporation for National and Community Service AmeriCorps Application Instructions: Your rating should reflect your opinion of the applicant's ability to meet each criterion provided on the Grant Review Score sheet. Do not make assumptions about missing background or project information, review only what is included. **The Montana Strategic Initiatives will only be used for ranking - DO NOT penalize the applicant for lack of Montana Strategic Initiatives.

Read for substance: A high-quality application is not always grammatically perfect. Being a good grant reviewer requires an ability to judge the substance of an idea, rather than the manner in which it is presented.

Comment on program quality: Take the time to make thoughtful comments to justify your score; comment on both strengths and weaknesses. Use specific and descriptive phrases in your comments, such as "the applicant did not adequately describe...."; "it is unclear whether...."; "the applicant should be asked to clarify.....".

Avoid interjecting your own biases: For example, even if you do not think tutoring programs are effective, your opinion should not affect the objective appraisal of a proposal for support of tutoring initiatives.

Comments, both verbal and written, during this process are public documents.

1. Read the Corporation for National and Community Service (CNCS) AmeriCorps Application Guidelines and Instructions

- Prior to reading ANY applications, this is extremely important.
- You will not be able to fairly evaluate a proposal unless you have an understanding of what has been asked by CNCS.

2. Review the Grant Review Score sheet

- The review questions were taken directly from the application guidelines and will help you read, evaluate and understand the main point.
- Each section of the scoresheet corresponds to one major section of the proposal.
- Questions at the beginning of each section will help you focus on the main points.

3. Lead Reviewer(s)

- You will be informed which application(s) you are the lead reviewer by Governor's Office of Community Service Staff.
- Each work group member will be a lead reviewer on at least 1 application.
- Lead reviewers will lead the work group discussion and interview of the applicant.
- The lead reviewer should have a comprehensive understanding of the assigned application.
- Primary Responsibilities
 - Open the discussion on the application by providing a very brief summary of the proposed program and comment on overall strengths and weaknesses.
 - Lead section discussions. Reviewers must come to consensus on a final score to be awarded in each section before they move on to the next section.
 - The lead reviewer will approve Consensus Review Score sheet created by Governor's Office of Community Service after consensus has been reached.
 - This page will be sent to the applicant after the final selections are made.

4. Skim all of the applications before you begin scoring

- Understand how applications relate to one another in terms of general strengths and weaknesses.

5. You will rate the application on a numerical scale.

- Assign a score for each question on a scale of zero to two (score allocation chart included in packet).
- Provide specific comments about strengths and weaknesses on the score sheet that justify your score and identify issues that need to be clarified.

6. Do not write on the applications themselves.

- You may highlight or underline sections of the proposals, but do not write any comments.

7. Score Sheet

- Keep your grant review score sheets with you and bring them to the November 30th interview process. You will retain the score sheets after the December 1st meeting.

8. Consensus Scoring

- Consensus Scores will be determined on December 1st by the entire work group
- If the work group cannot come to a consensus then scoring will be based on averages of score totals

9. Final Ranking—to be done December 1st 2010

- Final Ranking is based on the consensus review score sheet, Montana initiatives, and the Governor's Office of Community Service staff recommendation.
- Final ranking is used to determine ranking among applications very close in consensus scores.

10. Review group will select one member to present the Grant Review Work Group recommendations to the full commission during the December 10th 2010 full commission meeting.

Section I. Program Design - 50%

In assessing Program Design, reviewers will examine the degree to which the applicant clearly describes and convincingly links four major elements:

- (1) the problem(s) identified
- (2) the solution that will be carried out by AmeriCorps members and community volunteers
- (3) the ways in which AmeriCorps members are particularly well-suited to deliver the solution
- (4) the anticipated outcomes

Specifically, reviewers will assess the extent to which the applicant:

- Provides persuasive evidence that the identified problem exists in the targeted community(ies).
- Demonstrates that individuals recruited and selected to be AmeriCorps members will:
 - Have the appropriate backgrounds, qualifications and skills to succeed;
 - Receive orientation, training, and supervision to ensure impact in the community, and the necessary support to have a high-quality service experience.
- Makes the case that engaging AmeriCorps members is a highly effective means of solving the identified community problem.
- Describes how the activities in which AmeriCorps members and volunteers will engage will have a measurable impact on the identified community problem.

If a new applicant is already working on the problem identified in the application, the applicant should describe efforts and impact to date and describe how the proposed use of AmeriCorps members will add value, i.e., be more effective than what is currently being implemented, or enhance existing efforts.

2011 AmeriCorps Application	SCORE (0-2):	Comments (Strengths and Weaknesses)
-----------------------------	--------------	-------------------------------------

I. Program Design - 50%

A. Problem 10 Possible Points

Does The Applicant?

- Describe the problem(s) they will be working on?		
- Explain why they choose this problem?		
- Provide documentation of the extent/severity of the problem in the target community?		
- Describe the target community?		
- Describe the target community?		
Total	0	

B. Solution: AmeriCorps Member Roles and Responsibilities -10 Possible Points

Does The Applicant?

- Explain why are they proposing to use AmeriCorps to solve the identified problem?		
- Explain what members will do?		
- State how many members they are requesting?		
- Describe what types of slots (service terms) are needed for these members?		
- Explain how the different slot types align with the program design and activities if they are requesting different slot types?		
Total	0	

C. AmeriCorps Member Selection, Training, and Supervision - 24 Possible Points

Does The Applicant?

- Describe their plans for recruiting members for the program?		
- Describe how the applicants selected for the program will reflect a diverse member corps?		
- Describe how members will be included from the local communities to be served by the program?		
- Describe their plan for orienting members to AmeriCorps, the community they are serving, their placement site, and to the service they will perform?		
- Describe how they will ensure that training provided to members will prepare members to perform all the activities they will engage in during their term of service?		
- Describe, as necessary, the ongoing training provided to members throughout their terms?		
- Describe the anticipated training topics and the timeline for member training?		
- Demonstrate how they will provide structured opportunities for participants to reflect on and learn from their service in order to promote a lifelong ethic of service and civic responsibility?		
- Describe their plan for supervising members, and how they will ensure members receive adequate support and guidance throughout their terms?		
- Describe who will supervise the AmeriCorps members?		
- Describe how supervisors are selected and trained?		
- Describe how the program provides training, oversight, and support to supervisors?		
Total	0	

D. Outcome: Performance Measures - 8 Possible Points

Does The Applicant?

- Describe the overall change they want to see by the end of the three-year grant cycle?		
- Explain how they will measure impact?		
- Explain how they will report on this on an annual basis?		
- Explain how they determined their performance measure targets?		
Total	0	

E. Volunteer Generation - 10 Possible Points

Does The Applicant?

- Describe how the proposed program will recruit volunteers to expand the reach/impact in the community?		
- Explain how volunteers will help meet the identified community needs?		
- Describe the role(s) of volunteers?		
- Describe the role AmeriCorps members will have in volunteer recruitment and management?		
- Request a waiver of the requirement to recruit or support volunteers (see 45 CFR § 2520.35), if so did they explain the basis for the request in this section?		
Total	0	

F. Partnerships and Collaboration - 4 Possible Points

Does The Applicant?

- State who the community stakeholders and partners are?		
- Describe how they are involved in planning and implementing of the proposed program?		
Total	0	

G. Sustainability - 2 Possible points

Does The Applicant?

- Outline their plans for ensuring that the impact of the program in the community is sustainable beyond the presence of federal support?		
---	--	--

*For example, they might describe how the community relationships will lead to community investment in the program's continued operation; how they will diversify the funding sources to include a wide range of stakeholders (such as state, local, and private sector funding); how their strategies for recruiting and supporting volunteers will sustain member activities after the AmeriCorps grant ends; or how the community will maintain your project once it is completed.

Total	0	
-------	---	--

H. Tutoring Programs Only – 4 Points Possible – N/A Optional

Does The Applicant?

<p>- Describe how their process complies with AmeriCorps requirements for member tutoring qualifications? (Members who tutor must have a high school diploma, and successfully complete high-quality, research-based pre- and in-service training for tutors. This requirement does not apply to a member enrolled in a secondary school who is providing tutoring through a structured, school-managed cross-grade tutoring program.)</p>		
<p>- Describe how their strategy for training members complies with AmeriCorps requirements for member tutor training that is high quality and research based, consistent with the instructional program of the local agency and with state academic content standards [section 1111 of the Elementary and Secondary Education Act of 1965 (20 U.S.C. 6311)], includes appropriate member supervision by individuals with expertise in tutoring, and provides specialized pre-service and in-service training consistent with the activities the member will perform?</p>		
Total	0	

SECTION I TOTAL	0	Of Possible	68
------------------------	----------	--------------------	-----------

Section II. Organizational Capability – 25%

Reviewers will assess the extent to which:

- The organization has the experience, staffing, and management structure to plan, implement and evaluate the proposed program.
- The organization has secured, or describes an effective plan for securing, the financial and in-kind resources necessary to support program implementation and to demonstrate community stakeholder support
- Multi-state applicants have consulted with state and territory service commissions to ensure non-duplication and coordination of Corporation resources.
- Current or previous AmeriCorps grantees filled the member positions they were awarded and retained the AmeriCorps members they enrolled.
- The organization has a well-developed plan for expanding on its success through expansion or assuring adaptation of its program model by other organizations.

2010 AmeriCorps Application	Score (0-2)	Comments(Strengths and Weaknesses)
A. Organizational Background - 16 Possible Points		
Does The Applicant?		
- Identify the primary and secondary contacts for the grant application?		
- Describe the organization’s prior experience administering AmeriCorps grants or other federal funds?		
- Describe the organization’s experience raising funds to support service activities and initiatives?		
- List all sources of organizational funding in this section, and what percent the proposed project represents in the budget?		
- If they have received support from CNCS during the last five years, did they specify what type of support they received?		
- State what percentage of their total funding comes from CNCS?		
- Describe how the program is integrated and supported within their organization (if they already operate an AmeriCorps program)?		
- Include information explaining the organization’s management structure and how the board of directors (if applicable), administrators, and staff members will be used to support the program?		
Total	0	

B. Staffing - 8 Possible Points**Does The Applicant?**

- State who will staff the AmeriCorps program and what their specific role will be?		
- Explain their relevant experience?		
- Describe the desired qualifications for each open position, if positions are currently vacant?		
- Explain their plans for: providing financial and programmatic orientation; training and technical assistance; and monitoring for compliance to the program and service sites?		
Total	0	

C. Multi-state Applicants Only – 2 Possible Points – N/A Optional**Does The Applicant?**

- Describe the manner and extent to which they consulted with the State Commission in the states in which they plan to operate?		
Total	0	

D. Multi-Site Programs Only – 8 Possible Points – N/A Optional**Does The Applicant?**

- Identify the proposed member service sites?		
- Describe their process for selecting service sites and ensuring they have adequate programmatic and financial capabilities?		
- Explain how the site selection process will incorporate the criteria required by the AmeriCorps regulations 45 CFR §2522.475 (quality, innovation, sustainability, quality of leadership, past performance, community involvement), and the special considerations found in 45 CFR §2522.450 (program models, program activities and programs supporting distressed communities)?		
- Explain their current or previous programmatic and funding relationships with the sites?		
Total	0	

K. Current Grantees Only – 4 points Possible-- N/A Optional

Does The Applicant?

Enrollment: If the program enrolled less than 100% of slots received during their last full year of program operation, did they provide an explanation, and describe their plan for improvement?

--

--

Enrollment rate is calculated by dividing regular slots filled plus refill slots filled by regular slots awarded.

Retention: If the program were not able to retain all of your members during their last full year of program operation, did they provide an explanation, and describe their plan for improvement?

--

--

While we recognize retention rates may vary among equally effective programs depending on the program model, we expect grantees to pursue the highest retention rate possible. Retention rate is calculated by dividing the number of members exited with award (full or partial award) by the number of members enrolled.

Total	0
-------	---

C. Special Circumstances - 2 Points Possible

Does The Applicant?

In applying the organizational capability criteria to each proposal, reviewers may also take into account the following circumstances of individual organizations: The age of your organization and its rate of growth; and whether your organization serves a resource-poor community, such as a rural or remote community, a community with a high poverty rate, or a community with a scarcity of philanthropic and corporate resources.

--

--

Total	0
-------	---

SECTION II TOTAL	0	Possible	26
-------------------------	----------	-----------------	-----------

Section III. Cost Effectiveness and Budget Adequacy – 25%

For cost-reimbursement grants, reviewers will assess the extent to which:

- The budget is clear, reasonable, cost-effective, and in alignment with the program narrative.
- The requested funds do not exceed the maximum cost per Member Service Year (MSY), or for existing programs, have not increased over previous years.

For EAPs and full-time fixed amount grants, reviewers will assess:

- The amount requested per member. Fixed-amount applicants are encouraged to request less than the full maximum amount allowed per MSY. The amount requested is a competitive factor in the selection process.
- The applicant’s understanding of total program cost and capacity to raise additional resources beyond the fixed-amount.

2010 AmeriCorps Application	Score (0-2)	Comments(Strengths and Weaknesses)
-----------------------------	-------------	------------------------------------

A. Cost Effectiveness - 8 Possible Points

The Corporation cost per MSY is determined by dividing the Corporation’s share of budgeted grant costs by the number of MSYs you are requesting in your grant. It does not include child care or the cost of the education award. One MSY is equivalent to at least 1700 service hours, a full-time AmeriCorps position. The Corporation cost per MSY will be automatically calculated once you enter your budget in eGrants.

The maximum cost per MSY allowable is published each year in the *Notice*. Cost effectiveness will be evaluated by analyzing cost per MSY in relation to your program design. If you request above the maximum, please justify. This is rarely approved.

Does The Applicant?

- Demonstrate how the program has or will obtain diverse non-federal resources for program implementation?		
- Indicate how much funding the program needs from non-Corporation sources to support the project?		
- Indicate the non-Corporation resource commitments (in-kind and cash) that they have obtained to date and the sources of these funds?		
- Indicate what additional commitments they plan to secure, and how they will secure them?		
Total	0	

B. Current Grantees Only - 2 Possible Points - N/A Optional

Does The Applicant?

- Describe the extent to which they are increasing the share of costs to meet or exceed program goals or the extent to which they are proposing deeper impact or broader reach without a commensurate increase in Federal funds?		
Total	0	

C. Special Circumstances - 2 Possible Points

Does The Applicant?

In applying the cost-effectiveness criteria, the Corporation will take into account the following circumstances of individual programs: program age, or the extent to which your program brings on new sites; whether your program or project is located in a resource-poor community, such as a rural or remote community, a community with a high poverty rate, or a community with a scarcity of corporate or philanthropic resources; whether your program or project is located in a high-cost, economically distressed community, measured by applying appropriate Federal and State data; and whether the reasonable and necessary costs of your program or project are higher because they are associated with engaging or serving difficult-to-reach populations, or achieving greater program impact as evidenced through performance

Total 0

D. Budget Adequacy - 2 Possible Points

Does The Applicant?

- Discuss the adequacy of your budget to support your program design including how it is sufficient to support your program activities and desired outputs and outcomes? (Unless they are applying for an EAP or Full-time Fixed-amount grant)

Total 0

E. EAPs and Full-time Fixed-amount Applicants Only - 2 Possible Points - N/A Optional

The extent to which a current grantee is increasing its share of costs will not be considered in assessing a fixed-amount application. However, all other indicators described under Cost Effectiveness and Budget Adequacy apply and the section will be weighted 25% of the total application. Fixed-amount applicants are encouraged to request less than the full maximum amount allowed per MSY. The amount requested is a competitive factor in the selection process.

Does The Applicant?

- Discuss how they will raise the resources they will need to manage and operate an AmeriCorps program and identify the total amount they have budgeted to operate the program, both the CNCS share and grantee share?

Keep in mind that full-time AmeriCorps program costs include expenditures for the AmeriCorps living allowance, health care and criminal history checks. Education Award Programs are not required to pay living allowances or cover health care for less-than-full-time members, but must conduct criminal history checks. Programs will not be required to track or report on their expenditures. However, they must demonstrate that they have planned for total costs. Reviewers will assess the adequacy of the plan to secure resources to support the program design.

Total 0

F. Evaluation Summary or Plan - 2 Points Possible

If an applicant is competing for the first time, they will enter N/A in the Evaluation Summary or Plan field since it pertains only to re-competing grantees. If a program is re-competing for AmeriCorps funds for the first time they must submit a summary of their evaluation efforts or plan to date in the Evaluation Summary or Plan field in eGrants. If a program is re-competing for the second time, they must submit their evaluation report according to the application instructions in section V. D. An evaluation report may be submitted in place of an evaluation plan.

The evaluation requirements differ depending on the amount of the grant, as described in the AmeriCorps Regulations, Section 2522.710:

- If you are State and National grantee (other than an Education Award Program grantee), and your average annual Corporation program grant is \$500,000 or more, you must arrange for an external evaluation of your program, and you must submit the evaluation with any application to the Corporation for competitive funds as required in §2522.730 of this subpart.
- If you are State and National grantee whose average annual Corporation program grant is less than \$500,000, or an Education Award Program grantee, you must conduct an internal or an external evaluation of your program, and you must submit the evaluation with any application to the Corporation for competitive funds as required in §2522.730 of this subpart.

A formula program that re-applies and is submitted as a competitive application will be considered a re-competing application, if it satisfies the Corporation’s definition of “same project,” below. If your project satisfies the definition, you will be required to submit an evaluation plan, summary, or evaluation report when you re-compete. If your project does not satisfy the definition, it will be considered new and will not be required to submit an evaluation plan, summary, or completed evaluation.

Two projects will be considered the same if they:

- address the same issue areas;
- address the same priorities;
- address the same objectives;
- serve the same target communities and population;
- utilize the same sites; and
- use the same program staff and members.

Does The Applicant?

- Submit a copy of their evaluation? If not was a plan submitted for doing an evaluation in the future?		
Total	0	

SECTION III TOTAL	0	Of Possible	14
--------------------------	----------	--------------------	-----------

2010 AmeriCorps Applicant	Reviewer
Overall Strengths of Proposal:	
Overall Weaknesses of Proposal:	

Reviewer Score

I. Program Design - 50%

Section Total	0	Of Possible	68	Section Percent	0.00%
Section Percent	0.00%	X	50	=	0.00
					Section Final

II. Organizational Capability - 25%

Section Total	0	Of Possible	26	Section Percent	0.00%
Section Percent	0.00%	X	25	=	0.00
					Section Final

III. Cost Effectiveness of Budget - 25%

Section Total	0	Of Possible	14	Section Percent	0.00%
Section Percent	0.00%	X	25	=	0.00
					Section Final

Final Score	0.00	Of 100
--------------------	------	--------

Interview Questions

Interview Comments

Grant Review

*This score sheet does not affect the application score and is used by the Grant Review Workgroup for ranking purposes only.

Scoring

- + Met and Demonstrated experience
- ✓ Met expectation
- Did not meet requirement/expectation

Montana State Service Plan

Montana State Initiatives

- The Governor’s strategic initiative for clean energy
- The Governor and First Lady’s strategic initiative for math and science education
- Expand and Promote Volunteerism in Montana

Does the Participant?	Score	Comment
- Have a plan to include the Governor’s Clean Energy initiative		
- Have a plan to include the Governor and First Lady’s Math and Science initiative?		

Montana Expectations for all Programs

- Disability inclusion in the design and delivery of the program
- A collaborative approach to program planning, design and delivery
- Demonstrated ability to successfully administer an AmeriCorps or other federal grant
- Addressing rural, underserved or areas of extreme poverty that are not currently served by AmeriCorps programs

Did the Participant?	Score	Comment
- Explain how their program will be inclusive?		
- Explain how their program will have a collaborative approach to program planning,		
- Demonstrate ability to successfully administer an AmeriCorps or other federal grant?		
- Address rural, understated or areas of extreme poverty?		
- Explain the how they intend to expand and promote volunteerism in Montana?		

The Ranking Process will consider 3 factors: the grant review score sheet, the Montana Initiatives and Expectations score sheet, and the Staff Assessment and Recommendation sheet.

