



AmeriCorps State Grant FFY2021OCSFormula Notice of Funding Opportunity (NOFO) Request For Proposals (RFP)

This *Notice* outlines the process for applying for an AmeriCorps State grant, funded by the Corporation for National and Community Service (CNCS), administered by the Montana Governor's Office of Community Service (OCS aka ServeMontana). The level and timing of grant funding is subject to availability of annual appropriations. OCS reserves the right to modify any component of this RFP, at any time.

Notice of Funding Opportunity (NOFO)

This *Notice* is the first in a multistep process an applicant must complete to apply for and receive AmeriCorps State Formula program and planning grant funding. ServeMontana's role is to solicit, screen and rank applications. All applications cleared through screening will be ranked and submitted to CNCS for funding determination. A description of the process used by CNCS is contained in this *Notice*. This *Notice* should be read together with AmeriCorps Regulations, 45 C.F.R.2520–2550, Mandatory Supplemental Information, Application Instructions, and Performance Measure Instructions which are incorporated by reference. It is recommended that applicants review federal regulations at www.ecfr.gov and grant management materials on [CNCS's website](#).

ServeMontana

Montana's Commission on Community Service was established in 1993 to administer grants under the National and Community Service Trust Act of 1993, amended by the Edward M Kennedy Serve America Act of 2009. Under the Montana Commission on Community Service, ServeMontana administers funds to AmeriCorps State programs, encourage citizens of all ages, backgrounds, and abilities to engage in service, involve youth in the life and work of communities, and strengthen volunteerism for all Montanans.

Expectations ServeMontana expects all respondents to display the following features:

- ✓ Address rural, Tribal, underserved, or areas of poverty not currently served by AmeriCorps programs
- ✓ Clearly connect proposed activities to the needs and priorities in the Montana State Service Plan
- ✓ Collaborative approach to program planning, design, and the delivery
- ✓ Inclusive design and delivery, the program is accessible to individuals with disabilities

Purpose of AmeriCorps Funding

AmeriCorps grants are awarded to eligible organizations to engage AmeriCorps members in evidence-based interventions to strengthen communities. An AmeriCorps member is an individual who engages in service through an approved National Service position. Members may receive a living allowance and other benefits while serving but are not employees. Upon successful completion of service, members earn a Segal AmeriCorps Education Award from the National Service Trust. Commonly referred to as the 'Ed Award', members receive a voucher that can be used to pay higher education expenses or for qualified student loans, for up to seven years. Members age 55+ may be able to transfer their Education Award.

Who Should Apply To This Notice Of Funding Opportunity (NOFO)?

Organizations continuing a formula funded program or proposing a new AmeriCorps State program that operates only in Montana must apply to this competition. The Governor's Office of Community Service will engage a Grant Review Workgroup to review and score grants through a selection process, described in this *Notice*, and select applicants for recommended funding. Funding recommendations are presented to the full Montana Commission of Community Service for approval. Applicants who receive funding for AmeriCorps programs through this *Notice* are overseen by the Governor's Office of Community Service (OCS) in all areas of grant management.

Applying to this Notice is required for AmeriCorps programs that propose to serve primarily in the state of Montana. Tribes and Tribal organizations may apply through this *Notice* or may choose to apply directly to CNCS. CNCS may award a Cost Reimbursement or an Education Award Program grant to any successful applicant, but a Fixed Amount grant is limited to certain applicants.

Organizations seeking to apply for a one-year Planning Grant to identify if AmeriCorps State resources are well-suited to meet identified needs and plan a program are encouraged to apply. See Planning Grant Supplement for more information.

Dual Points of Contact - All Applicants

From the date this Request for Proposal (RFP) is officially posted until an applicant(s) is selected and announced by OCS, *applicants shall only communicate with designated state staff listed below, regarding this Notice*. Any unauthorized contact may disqualify the application from further consideration.

Sarah Sadowski, OCS Grants Manager
ph: 406.444.5547
ssadowski@mt.gov

Sheree Isola, OCS Financial Manager
ph: 406.444.1809
ShIsola@mt.gov

Costs/Ownership of Materials - All Applicants

The applicant is solely responsible for all costs it incurs prior to the approved award dates and State of Montana contract execution. The State shall own all materials submitted in response to this RFP.

Montana State Service Plan

The 2019-2021 Montana State Service Plan outlines the goals and objectives of the Governor's Office on Community Service (OCS). Applicants should strive to implement evidence-based service strategies to meet one or more of the needs identified in the State Service Plan, visit <http://serve.mt.gov/About/State-Service-Plan>.

Timeline

March 26, 2021 Official posting of the *Notice*

April 2, 2021 All applicants, due to serve@mt.gov by 5pm Mountain Time

- Letter of Intent (LOI)
- PDF of current SAM & CCR registration, <https://www.sam.gov/portal/SAM/#1>
- Documentation of Federally Approved Indirect Cost Rate, *if applicable*
- New Applicant Readiness Self-Assessment
- Current organization audit, *if applicable*

New Planning Grant applicants must also submit the following

- Current organizational chart
- Current Strategic plan

April 5-9 **Technical assistance period*** Submit questions via email to serve@mt.gov.

April 9 Last day to submit an Alternative Match Request

April 15 **New Formula and Planning Grant applicants:** Application Due Date 5pm Mountain Time

- Complete Application, submitted in eGrants <http://www.nationalservice.gov/egrants/>
- Additional Documents, submitted via email to serve@mt.gov
- [CNCS Operational and Financial Management Survey \(OFMS\)](#)

May 12 **Grant Review Workgroup Meeting**

May 17-21 **Applicant clarification period** – All recommended applicants

May 21 **Clarified applications resubmitted in eGrants** *no later than 5pm*

July 2021 **Applicants notified of funding determination**

***Technical Assistance**

Participation in the technical assistance period is optional, and highly encouraged. Applicants are encouraged to use the opportunity to ask clarifying questions, obtain a better understanding of the RFP process, the project, and to notify the State of any ambiguities, inconsistencies, or errors discovered in this RFP. All questions and written responses will be posted on the ServeMontana website at <http://serve.mt.gov/AmeriCorps/americorps-grants>.

CNCS Focus Areas

The National and Community Service Act of 1990, amended by the 2009 Serve America Act, emphasizes measuring the impact of service and focuses on a core set of issue areas. To carry out Congress' intent and to maximize the impact of investment in National Service, CNCS maintains six primary Focus Areas:

Disaster Services Grants provide support to increase the personal preparedness of individuals for disasters; improve individuals' readiness to respond to disasters; help individuals recover from disasters; and/or help communities mitigate disasters.

Economic Opportunity Grants provide support and/or facilitate access to services and resources that contribute to improved economic well-being and security of economically disadvantaged people; help those people have improved access to services that enhance financial literacy; transition into or remain in safe, affordable housing; and/or have improved employability leading to increased success in becoming employed.

Education Grants provide support and/or facilitate access to services and resources that contribute to improved education outcomes for economically disadvantaged students; improved school readiness for economically disadvantaged children; improved educational and behavioral outcomes of students in low-achieving elementary, middle, and high schools; and/or support economically disadvantaged students prepare for success in post-secondary educational institutions.

Environmental Stewardship Grants support responsible stewardship of the environment, while preparing communities for challenging circumstances and helping Americans respond to and recover from disruptive life events: programs that conserve natural habitats; protect clean air and water; maintain public lands; support wildland fire mitigation; cultivate individual and community self-sufficiency and provide reforestation services after floods or fires.

Healthy Futures Grants provide support for activities that will address the opioid crisis; increase seniors' ability to remain in their own homes with the same or improved quality of life for as long as possible; and/or increase physical activity and improve nutrition with the purpose of reducing obesity.

Veterans and Military Families Grants positively impact the quality of life of veterans and improve military family strength, and increase the number of veterans, wounded warriors, military service members, and their families benefiting from service with AmeriCorps.

Capacity Building Grants provide support for capacity building activities provided by AmeriCorps members. As a general rule, capacity building activities are *indirect services* that enable organizations to provide more, better, and sustained *direct services* in the above six focus areas. Capacity building *cannot* be solely intended to support the administration/operations of the organization. Examples include recruiting and/or managing community volunteers, implementing effective volunteer management practices, conducting community assessments that identify goals and recommendations, developing new systems and processes (technology, performance management, training, etc.), or enhancing existing systems and business processes.

Montana Governor Initiatives

Applicants are encouraged to engage in the Montana Governor's initiatives.

- American Indian Affairs- The Governor's initiative aims to engage Tribal members into service with Montana's AmeriCorps programs and to foster programs that make real impacts in addressing the diverse needs facing Montana's Tribal Nations, with cultural competency.
- Childhood Hunger - The Governor and First Lady's initiative to fight childhood hunger in Montana through innovative, evidence-based strategies in schools and communities not currently served by AmeriCorps.
- Early Childhood Education - Governor Bullock's initiative to ensure every Montana child arrives at kindergarten ready to learn. Children who receive quality early learning are more likely to read at grade level, graduate from high school, and earn more money as adults.
- Forests in Focus – The Governor's initiative seeks to engage coalitions of stakeholders to create the brightest possible future for our forests; promote stewardship of lands to meet a variety of objectives; and focus on land management activities that restore forests and watersheds, drought resiliency, wildfire risk reduction, and improve habitat and water quality.
- SMART Schools – “SMART” refers to a school's ability to “**Save Money And Resources Today**” by implementing behavioral and operational changes to promote energy efficiency and health. The initiative encourages schools to become more energy efficient, reduce waste, promote health, and to implement sustainable practices.
- Suicide Prevention – The suicide prevention initiative aims to increase awareness and access peer mentoring, mental health services, youth engagement, help schools develop protocols, train teachers and community members, and other innovative evidence-based strategies to save lives in Montana.

Screening

To be eligible for consideration under this *Notice*, an applicant must meet the intent of all requirements listed in this packet. ServeMontana staff will determine whether the applicant's proposal complies with the requirements. If responses do not meet the full intent of all requirements listed in this *Notice*, the application may be deemed unresponsive or incomplete and will be removed from the review process.

Applicants will be reviewed to ensure they meet the standards of responsibility in accordance with [ARM 2.5.407](#). Such a determination may be made at any time during the process if information surfaces that would result in the determination of non-responsibility.

AmeriCorps Funding Priorities (See Mandatory Supplemental Information)

To receive priority consideration, applicants must show that the priority area is a significant part of the program focus and intended outcomes and must include a high-quality program design. Proposing a program that receives priority consideration does not guarantee funding.

CNCS seeks to prioritize the investment of National Service resources in the following areas:

- Efforts to help local communities recover from the COVID19 pandemic. Applicants may propose programming in any CNCS focus area to aid communities as they recover from the COVID19 pandemic.
- Programs that actively engage in removing structural racial inequities, advancing racial equality, and increasing opportunity in order to achieve sustainable change in communities.
- Economic Opportunity – evidence-based interventions on CNCS Evidence Exchange. To qualify for this priority, the applicant must be assessed as having Moderate or Strong evidence by CNCS reviewers. https://www.nationalservice.gov/sites/default/files/evidenceexchange/CNCS_Economic_Opportunity_Evidence_Brief_2019_508.pdf OR increasing economic opportunities for communities by preparing people for the workforce.
- Education - evidence-based interventions on the CNCS Evidence Exchange. To qualify for this priority, the applicant must be assessed as having Moderate or Strong evidence by CNCS reviewers. https://www.nationalservice.gov/sites/default/files/evidenceexchange/CNCS_Education_Evidence_Brief_112318_508.pdf
- Healthy Futures - evidence-based interventions on the CNCS Evidence Exchange. To qualify for this priority, the applicant must be assessed as having Moderate or Strong evidence by CNCS reviewers. https://www.nationalservice.gov/sites/default/files/evidenceexchange/HF_Evidence_Brief_FINAL_v2_508.pdf OR reducing and/or preventing prescription drug and opioid abuse.
- Veterans and Military Families - positively impacting the quality of life of veterans and improving military family strength.
- Rural intermediaries - organizations that demonstrate measurable impact and primarily serve rural communities with limited resources and organizational infrastructure.
- Faith-based organizations.
- Programs that reduce child poverty
- Environmental Stewardship
- Economic Mobility Corps – a joint initiative with the Community Development Financial Institutions Fund to place national service members at Certified Community Development Financial Institutions to enhance their capacity to provide financial literacy, financial planning, budgeting, saving, and other financial counseling activities in distressed and underserved areas (See Attachment A)

Montana Encouraged Program Elements

- Program design that incorporates National Commission on Military, National, and Public Service's recommendations in their Final Report Appendix C, Best Practices in Civic Education and Service Learning. AmeriCorps members should receive impactful civic education and/or service-learning as part of member development that increases knowledge and deepens the members ethic of service.
- Program design includes engaging citizens with lived experience to serve people in the area of defined need with robust training, development, and support.
- Intended program design engages Montanans and uniquely prepares them to serve the communities where they live.

Montana Encouraged Planning Elements: Planning Grant applicants refer to Planning Grant Supplement

Performance Measures: Planning Grant applicants refer to Planning Grant Supplement

All operational program applications must include at least one aligned performance measure (output and outcome) corresponding to the proposed primary intervention. This may be a National Performance Measure or an applicant-determined measure. Additional performance measures, including output-only National Performance Measures, may be included if desired; however, all performance measures must be consistent with the program's Theory of Change and represent significant program activities. CNCS does not expect applicants to select performance measures to correspond to every potential member activity or community impact. CNCS values quality of performance measures over quantity of performance measures.

CNCS expects applicants to use National Performance Measures as part of their comprehensive performance management strategy if the National Performance Measures are part of the applicant's theory of change. Applicants should use both performance and evaluation data to learn from their program activities as well as make tactical and strategic adjustments to achieve their goals.

Refer to CNCS Performance Measure Instructions for detailed information on performance measure statements, requirements, and data collection expectations.

Federal Award Information* *Planning Grant applicants refer to Planning Grant Supplement

Available Funds

OCS expects a highly competitive AmeriCorps grant selection process. The actual amount and timing of funds awarded is subject to the availability of annual appropriations.

Estimated Award Amount

Grant awards have two components: operating funds and AmeriCorps member positions with corresponding Education Award amounts. Grant award amounts vary – both in the level of operating funds and in the type and amount of AmeriCorps member positions – as determined by the scope of the project.

Project and Award Period

The grant award covers a three-year project period unless otherwise specified. The project period and budget are typically one year, with a start date proposed by the applicant. In most cases, the application is submitted with a one-year budget. Continuation funding for subsequent years is not guaranteed and shall be dependent upon availability of appropriations and satisfactory performance.

The project start date may not occur prior to the date CNCS awards the grant. AmeriCorps members may not enroll prior to the start date of the award. AmeriCorps members may not begin service prior to the beginning of the member enrollment period as designated in the grant award. A program may not certify any hours a member performs prior to the beginning of the member enrollment period. The earliest suggested program start date is September 1, 2021, with the understanding some applicants may choose to operate on the calendar year.

Type of Award

AmeriCorps Operating Grants: CNCS may award a Cost Reimbursement or a Fixed Amount grant to any successful applicant, the availability of a Fixed Amount grant is limited to certain applicants. CNCS will not provide both types of grants for the same project in one fiscal year. More info under *Eligible Applicants* section and the Mandatory Supplemental Information.

Grant Types	Cost Reimbursement, line item	Fixed Amount			
		Note: Under current CNCS policy, a program must achieve 100% member retention rate to receive the full amount of a fixed grant award. Montana's member retention expectation is 90			
Available Subtypes	Traditional	Full-Cost	Education Award Program (EAP)	Professional Corps See Member Living Allowance section for requirements	No Cost Slots
Maximum Cost per MSY	\$16,295	\$16,295	\$800 or \$1,000*	\$1,000	\$0
Type of Slots in the National Service Trust	Full-time, Three Quarter-time, Half-time, Reduced half-time, Quarter-time, Minimum Time, Abbreviated Time	Full-time, Three Quarter-time, Half-time, Reduced half-time, Quarter-time, Minimum Time, Abbreviated Time	Full-time, Three Quarter-time, Half-time, Reduced half-time, Quarter-time, Minimum Time, Abbreviated Time	Full-time only	Full-time, Three Quarter-time, Half-time, Reduced half-time, Quarter-time, Minimum Time, Abbreviated Time
Budget Submission Required	Yes	No		Yes, if requesting operating funds	No
Funds available linked to enrollment & retention	No	Yes			No
Special Requirements	N/A	N/A		Must place qualified professionals in communities with an inadequate number of such professionals. Member salaries and benefits must be paid entirely by organization where member serves and not included in budget.	N/A
Financial Reporting Requirements	Yes	No			
Available to new Applicants	Yes	No	Yes		

*Per 42 U.S.C. § 12581a, the Corporation may provide the operational support under this section for a program in an amount that is not more than \$800 per individual enrolled in an approved national service position, or not more than \$1,000 per such individual if at least 50 percent of the persons enrolled in the program are disadvantaged youth.

Eligibility Information – All Applicants

Eligible Applicants The following non-Federal entities (as defined in 2 C.F.R. §200.69) who have DUNS numbers and are registered in System for Award Management (SAM) are eligible to apply:

- Indian Tribes (2 C.F.R. §200.54)
- Institutions of higher education (2 C. F.R. §200.54)
- Local governments (2 C.F.R. §200.64)
- Nonprofit organizations (2 C.F.R. §200.70)
- States (2 C.F.R. §200.90)

Dun and Bradstreet University Numbering System (DUNS) Number & System for Award Management (SAM)

Applications must include a DUNS number and an Employer Identification Number (EIN). The DUNS number does not replace an EIN. DUNS numbers may be obtained at no cost by calling the DUNS number request line at (866) 705-5711 or by applying online: [DUNS Request Service](#). After obtaining a DUNS number, all applicants must register with the [System for Award Management \(SAM\)](#) and maintain an active SAM registration until the application process is complete and, if a grant is awarded, throughout the life of the Award. SAM registration must be renewed annually. OCS suggests finalizing a new registration or renewing an existing one at least two weeks before the application deadline to allow time to resolve any issues that may arise. Applicants must use their SAM-registered legal name and address on all grant applications. Applicants that do not comply with these requirements are ineligible to receive an award.

Types of Applicants

State and Territory Service Commissions (for Single-State Applicants)

Organizations that propose to operate in only one state must apply through the Governor-appointed State Service Commission. Each state and territory commission administer its own selection process and submits the applications it selects directly to CNCS. A Single-State application from a State or Territory with a Commission that is submitted directly to CNCS by the applicant instead of the Commission will be considered noncompliant and will not be reviewed. See the Mandatory Supplemental Information for descriptions of National Direct and Single-State applicants

Federally recognized Indian Tribes: Indian Tribes may apply to this Notice or directly to CNCS.

In addition to Indian Tribes as defined in 2 CFR §200.54, tribal organizations controlled, sanctioned, and chartered by Indian Tribes are also eligible to apply. An entity applying on behalf of a federally recognized tribe or multiple specific federally recognized tribes must submit a sanctioning resolution, applicable for the entirety of the period of performance that the applicant is applying for, adopted by the Tribal Council (or comparable tribal governing body) of each Indian Tribe. The resolution(s) must identify the entity by name as a tribal organization and indicate whether it is controlled, sanctioned, or chartered by an Indian Tribe(s). It must authorize the entity to be the legal applicant and act on behalf of and include the Indian Tribe(s) in a CNCS application for the purpose of conducting the activities and providing the services described in the application. A current resolution will not meet this requirement unless the resolution applies for the *entire period of performance* of the award. In addition to being eligible to apply under this *Notice*, federally recognized Indian Tribes are eligible to apply for grants under a separate CNCS Notice of Federal Funding Opportunity for Indian Tribes.

New Applicants

Organizations that have never received AmeriCorps funding are encouraged to apply to this formula grant opportunity. New applicants are encouraged to apply for a Planning Grant. For more information, refer to the Planning Grant Supplement to this Notice, a separate and concurrent document.

Recompete applicants

Organizations that have received AmeriCorps funding in the last three years are eligible to apply for Cost Reimbursement and Education Award Program (EAP) grants but are not eligible to apply for Full-Cost Fixed Amount grants. Organizations that have received AmeriCorps funding whose three-year award period is ending, may apply to this Notice.

Existing subgrantees with Fixed Amount and Cost Reimbursement grantees who can demonstrate a successful history and current capacity to manage a Fixed Amount grant are considered to have AmeriCorps experience and therefore can apply for Fixed Amount grants. *See Mandatory Supplemental Information.*

Continuation applicants - funding information and requirements

Organizations that have current awards that continue beyond FFY2021 must apply in order to be eligible to receive funding for the following year. See the Application Instructions, if applicable. [Requests by existing continuation applicants for increases in the level of funding or number of positions will be assessed using the review criteria published in this Notice.](#) The review will also be based on progress reports, financial reports, evaluation plans, and CNCS staff knowledge of the grant program. To be approved for continuation funding, recipients must demonstrate satisfactory performance with respect to key program goals and requirements, as well as compliance with grant terms and conditions.

In addition to the Application Instructed continuation narrative, be sure to concisely address the areas of assessment: Budget, Match & MSY, Compliance Findings, Member Enrollment, Member Retention and Performance Measure Progress.

Continuation applicant's performance measures must align with the 2021 Performance Measure Instructions. To revise performance measures, "View/Edit" the performance measures that copy from your original application or add new performance measures. Note in the Continuation Changes field that you have updated your performance measures. If you are proposing significant increase or decrease to output or outcome targets for existing measures, provide a justification for the change.

CNCS reserves the right to award applications in an amount other than at the requested level of funding and will document the rationale for doing so.

Threshold Essentials

Applications should meet all threshold requirements for the grant type for which they are applying.

- All applicants should request at least 15 member slots. [Program](#) applicants with less than 15 members will be deemed noncompliant and will not be reviewed.
- [All applicants should budget at least \\$500 on the Grantee Share of the budget to implement new CNCS branding and messaging for the 2021-2022 program year.](#)
- If an applicant is applying for a Professional Corps grant, its application must demonstrate that the community where it will place AmeriCorps members serving as professionals has an inadequate number of said professionals.
- If the proposed service activities require specialized member qualifications and/or training (for example, tutoring: 45 C.F.R. §2522.910-.940) the applicant must describe how the program will meet the requirements.
- All applicants must propose program designs that are either evidence-based or evidence-informed. Applicants assessed as lower than the Preliminary evidence tier (i.e., Pre-Preliminary) must provide adequate responses to the Evidence Quality review criteria to be considered for funding.

Other Eligibility Requirements

Under section 132A(b) of the NCSA, organizations that have been convicted of a federal crime may not receive assistance described in this *Notice*. Applications that propose to engage in activities that are prohibited under CNCS's statutes, regulations, or the terms and conditions of its awards are not eligible to receive CNCS funding.

Note that under section 745 of Title VII, Division E of the Consolidated Appropriations Act, 2016, if CNCS is aware that any corporation has any unpaid Federal tax liability,

- which has been assessed
- for which all judicial and administrative remedies have been exhausted or have lapsed, and
- that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability,

that corporation is not eligible for an award under this *Notice*. (However, this exclusion will not apply to a corporation which a Federal agency has considered for suspension or debarment and has made a determination that suspension or debarment is not necessary to protect the interests of the Federal Government.) A similar restriction may be enacted with the appropriation which will fund awards under this *Notice*.

Pursuant to the Lobbying Disclosure Act of 1995, an organization described in Section 501(c)(4) of the Internal Revenue Code of 1986, 26 U.S.C. 501(c)(4) that engages in lobbying activities is not eligible to apply for CNCS funding.

Funding Restrictions

Member Living Allowance

A living allowance is not considered a salary or a wage. Programs are required to provide a living allowance for members in full-time positions and members serving in a full-time capacity. Full time capacity is generally 32 hours or more per week for 6 weeks or more. Programs are not required to provide a living allowance for members serving in less than full-time terms of service. If a program chooses to provide a living allowance to a less than full-time member, it must comply with the maximum limits in the table below. For Cost Reimbursement grants, the amount must be included in the proposed budget as either CNCS or grantee share. Exceptions noted below.

While Fixed Amount grant applicants are not required to submit detailed budgets, they are required to provide a living allowance that complies with the minimum and maximum requirements. Exceptions noted below. Fixed Amount grant applicants are not required to indicate that amount in the application and should request positions as "without living allowance" in the budget.

Table: Minimum and Maximum Living Allowance

Service Term	Minimum # of Hours	Minimum Living Allowance	Maximum Total Living Allowance
Full-time	1,700	\$15,100	\$30,200
Three Quarter-time	1,200	n/a	\$21,318
Half-time	900	n/a	\$15,988
Reduced Half-time	675	n/a	\$11,991
Quarter-time	450	n/a	\$7,994
Minimum-time	300	n/a	\$5,329
Abbreviated Time	100	n/a	\$1,776

Exceptions to the Living Allowance Requirements

Programs existing prior to September 21, 1993 are not required to offer a living allowance. If an applicant chooses to offer a living allowance, it is exempt from the minimum requirement, but not the maximum requirement.

EAP Grantees are not required to provide a living allowance, but if a living allowance is provided, it must comply with the maximum requirements set forth in the Living Allowance Table above.

Maximum Cost per Member Service Year (MSY)

Cost per MSY is determined by dividing the CNCS share of budgeted grant costs by the number of MSYs requested. It does not include childcare or the value of the Education Awards.

Table: Maximum Cost per MSY; determined by CNCS on an annual basis

Grant Program	Maximum
Individual Competitive State/Territory Program (cost reimbursement)	\$16,295*
Fulltime Fixed Amount Grant	\$16,295
Professional Corps Fixed Amount Grant	\$1,000**
Education Award Program Fixed Amount Grant	\$800 or \$1,000

*Cost reimbursement programs operating in rural communities (as defined in the Mandatory Supplemental Information) and cost reimbursement programs that recruit opportunity youth as AmeriCorps members may request up to \$16,800 cost per MSY for AmeriCorps members who will serve in rural areas or who are opportunity youth.

Segal AmeriCorps Education Award

AmeriCorps members who successfully complete a term of service will be eligible for an Education Award from the National Service Trust. The amount of the Education Award is linked to the value of the Pell Grant. A member has up to seven years after the term of service to use the Education Award. CNCS will provide the updated Education Award amounts at the time of grant award. *Note: Education Awards amounts are determined by the federal fiscal year of the grant award. Read the amounts listed on the Corporation for National & Community Service website very carefully.*

Cost Sharing and Matching

All funded grant types are administered on a cost reimbursement basis with advances subject to prior written request and approval.

Cost Reimbursement Grants - Line Item

Applicants are required to match funds based on the chart below. Applicants must demonstrate the ability to meet the match requirement at the time of application submission. The match can be non-CNCS cash and/or in-kind contributions. A first-time successful applicant is required to match 24% for the first three-year funding period. Starting with year four, the match requirement gradually increases each year, to 50% by year ten, according to the minimum overall share chart found in 45CFR§2521.60 and below.

AmeriCorps Funding Year	1, 2, 3	4	5	6	7	8	9	10+
Grantee Share Required Match	24%	26%	30%	34%	38%	42%	46%	50%

Section 121(e)(5) of NCSA (42 U.S.C. 12571(e)) requires programs that use other federal funds as match for an AmeriCorps grant to report the amount and source of these funds to CNCS on a Federal Financial Report (FFR). Grantees must track and be prepared to report on that match separately each year and at closeout.

Fixed Amount Grants and Education Award Program Grants

New Formula program and formula planning grants are not eligible to apply for Fixed Amount Grants.

Alternative Match

Under certain circumstances, applicants may qualify to meet alternative matching requirements that increase to 35 percent instead of 50 percent as specified in the regulations at 45 C.F.R. §2521.60(b). To qualify, applicants must demonstrate that the proposed program is either located in a rural county or in a severely economically distressed community as defined in the Application Instructions. *To receive consideration, an alternative match request must be submitted to OCS by the date specified in the Timeline.*

Indirect Costs

Application budgets may include indirect costs. Based on qualifying factors, applicants will either use a federally approved indirect cost rate, a 5/10 percent fixed option, a 10 percent *de minimis* rate of modified total direct costs or may claim certain costs directly as outlined in 2 CFR § 200.413. States, local governments and Indian Tribes may use approved indirect cost allocation plans. All methods must be applied consistently across federal awards. Applicants that have a federal negotiated indirect cost rate or that will be using the 10 percent *de minimis* rate must enter that information in the Organization section in the CNCS's web-based management system. *However, under section 121(d) of the NCSA and CNCS's regulations at 45 CFR 2521.95 and 2540.110, no more than five percent of award funds may be used to recover indirect costs on AmeriCorps grants.*

Application Submission Information, Planning applicants refer to the Planning Grant Supplement

Application Package Information necessary to apply is accessible at <http://serve.mt.gov/funding/>. Applicants may email serve@mt.gov or call 406.444.5547 for printed materials. TTY # is 800.833.3722.

Content and Form of Application: In eGrants, enter the following components of a complete application:

- Standard Form 424 (SF-424) Face Sheet: Populates when applicant completes eGrants fields
- Narratives
 - Executive Summary
 - Program Design
 - Organizational Capability
 - Cost Effectiveness and Budget Adequacy
 - Evaluation Plan
- Logic Model
- Standard Form 424 Budget
- Performance Measures
- Authorization, Assurances, and Certification

Page Limits

Page limits are determined by grant type by eGrants print out length. However, eGrants will allow an applicant to enter text that exceeds page limits.

There are two page limits that must be adhered to: Narrative and Logic Model.

Narrative: Applications may not exceed 10 pages for the Narratives or 12 pages for Multi-Focus Intermediaries with more than five operating sites.

- The number of locations entered by the applicant into the “multi-state operating sites” field in eGrants will be used to determine whether a multi-site application has more than five operating sites. The “multi-site operating sites” field can be found by clicking on the “operating sites” link in eGrants. Multi-state applicants that list five or fewer operating sites cannot exceed 10 pages for the Narrative.

Logic Model: The Logic Model may not exceed three pages when printed with the application from the “Review” tab in CNCS’s web-based management system.

In determining whether an application complies with page limits, CNCS/OCS will include:

- The application’s SF 424 Face Sheet, Executive Summary, and
- The Narrative portions contained in the Program Design, Organizational Capacity, and Cost Effectiveness and Budget Adequacy sections of the application.

The application page limit does not include the Budget, Budget Narrative, Evaluation Plan narrative, the Logic Model, performance measures, or the additional documents, if applicable. The length of a document in word processing may be different than the eGrants printout. Reviewers will not consider material that is over the page limits in the printed report.

The **page limit for the Continuation Changes Narrative** fields is **six pages**, as printed from eGrants.

The **page limit for the Planning Grant Narrative** fields is **seven pages**, as printed from eGrants.

How to Submit an Application

Applicants must submit the applications electronically in [CNCS eGrants](#). Because it is a unique system, it is *strongly recommended* that applicants initiate the application in eGrants and begin the application well before the deadline. Applicants should draft the content as a word processing document, then copy and paste the content into the appropriate eGrants fields. The length of a document in word processing software will likely be different than what will print out in eGrants- *follow the page limits*.

The applicant’s authorized representative must be the person who submits the application. To certify and submit the application the authorized representative must use eGrants under their own account. A copy of the governing body’s authorization for the official representative must be on file in the applicant’s office.

If a problem arises when creating an account or preparing or submitting the application contact the National Service Hotline at 800.942.2677 or via [eGrants Questions](#). Be prepared to provide the application ID, organization name, and the *Notice* to you are applying. If the issue cannot be resolved by the deadline, applicants must continue working with the National Service Hotline to submit the application via eGrants

Submission Dates and Times – All Applicants

Notification of Intent to Apply Submission of a Letter Of Intent (LOI) to apply is required **by Friday, April 2, 2021**. Submit the LOI by completing the template and emailing it to serve@mt.gov

- **A legal applicant with a competitive application under review by CNCS who indicated on the LOI that if unsuccessful competitively, intends to be a formula continuation will be considered under this Notice.** If that was not indicated on the LOI the competitive funding determination is final.

Applications are due Thursday April 15, 2021, by 5:00pm Mountain Standard Time to OCS via eGrants and serve@mt.gov for additional documents as appropriate. Late applications may not be reviewed.

- This deadline applies to new and planning grant applicants, and includes submission of additional documents. ServeMontana reserves the right to add documents to the RFP and to extend the deadline. Any such changes will be posted on OCS's website.
- ***When the application is submitted in eGrants, send an email to serve@mt.gov.***

Late Applications

All applications received after the submission deadline published in this *Notice* are presumed to be non-compliant. To overcome this presumption, the applicant must provide a written explanation or justification of the extenuating circumstance(s) that caused the delay, including:

- the timing and specific cause(s) of the delay
- the ticket number if a request for assistance was submitted to the National Service Hotline
- any information provided to the applicant by the National Service Hotline
- any other documentation or evidence that supports the justification

OCS must receive the written justification no more than one business day of the submission deadline at serve@mt.gov. Applicants must continue working in [eGrants](#) and with the National Service Hotline to submit the application as soon possible. OCS will determine whether to accept a late application on a case-by-case basis. Applicants that do not submit a justification or any other evidence to overcome the presumption of non-compliance within the published timeframe will not be reviewed.

Additional Documents

Only submit items requested in this *Notice* and Application Instructions. Items submitted that are not requested will not be reviewed or returned. Applicants are required to submit additional documents by the application deadline:

All applicants

- Evaluation briefs, reports, studies. Refer to *Evidence Base* section for instructions by evidence tier. [If multiple evaluation briefs/reports/studies are submitted by the applicant, the most recent \(as measured by the date of completion or publication\) will be reviewed first, and any documents submitted beyond the allowable number will not be reviewed.](#)
- Current indirect rate cost agreement, if used to claim indirect/administrative costs
- Labor union concurrence (if applicable)
- Federal debt delinquency (if applicable)

Recompeting applications

- Evaluation report, if required. [Please submit in Word. The evaluation report should include a title page with the CNCS grant ID for the project that was evaluated, the name of the project, and the date of completion of the report. If any of this required information is missing, the applicant may not receive credit for meeting their evaluation requirements.](#) Please see the *Evidence Tiers* definitions in the Mandatory Supplemental Information and this Notice. Evaluation Plan for further information.
- All recompile applicants regardless of funding level are required to submit the Operational and Financial Management Survey (OFMS) [in WORD](#). See the OFMS under Application Certification Forms Section, <https://www.nationalservice.gov/resources/financial-management/financial-and-grants-management>
- Two letters of support

New applications, including planning grant applicants

- Readiness Self-Assessment
- All New applicants regardless of funding level are required to submit the Operational and Financial Management Survey (OFMS) **in WORD**. See the OFMS under the Application Certification Forms Section, <https://www.nationalservice.gov/resources/financial-management/financial-and-grants-management>
- Two letters of support

New Planning Grant applicants must also submit the following

- Current organizational chart
- Current Strategic plan

Governor/Mayor Initiative applicants (New applicants)

- Letter(s) of support from partnering nonprofits
- Letter of support cosigned by Governor/Tribal Chair and participating Mayor(s)

Rural Intermediaries:

- Letters of support from the consortium members, no more than three.

Entities applying on behalf of a Federally Recognized Tribe

- Sanctioning resolution adopted by the Tribal Council of each Indian Tribe. (See the *Eligible Applicants*)

Additional Documents must be emailed to serve@mt.gov with the subject line: [Legal Applicant Name] – [Application ID number]. Emails should include the following information:

- the legal applicant name and its point of contact information
- a list of documents that should be attached to the email
- individually saved files that are clearly labeled
- files that include the legal applicant name and application ID number within the body of each document.

Attachments to emails should include individually saved files

- Each file should include a header or title within the body of each additional document to include the legal applicant name and application ID number.

Review Criteria; The scoring matrices are available online*

***Planning grant applicants refer to Planning Grant Supplement Assessment Criteria**

Each applicant must describe a project to deploy AmeriCorps members effectively to meet significant community need(s). OCS urges applicants to submit high quality applications that follow the *Notice* and the Application Instructions. Application and budget quality are key factors in determining the funding recommendation.

OCS recommends applicants use the assessment criteria described in each section as prompts for narratives. Use guidance on points to prioritize the length of information provided in each section. Prior to submission, OCS recommends that applicants use the assessment criteria and/or score sheet to review your application, or to have a peer review.

Application Review Information by Application Fields

Categories/Subcategories	Percentage
Executive Summary	0
Program Design	50
Theory of Change and Logic Model	21
Evidence Tier	12
Evidence Quality	8
Notice Priority	3
Member Experience	6
Organizational Cabability	25
Organizational Background and Staffing	9
Compliance and Accountability	8
Culture That Values Learning	4
Member Supervision	4
Cost Effectiveness and Budget Adequacy	25

A. Executive Summary (Required – Pass/Fail - 0 percent)

Fill in the blanks of these sentences to complete the Executive Summary. **Do not deviate from the template.**

The [Name of the organization] proposes to have [Number of] AmeriCorps members who will [service activities the members will be doing] in [the locations the AmeriCorps members will serve]. At the end of the first program year, the AmeriCorps members will be responsible for [anticipated outcome of project]. In addition, the AmeriCorps members will leverage [number of leveraged volunteers, if applicable] who will be engaged in [what the leveraged volunteers will be doing.]

This program will focus on the CNCS focus area(s) of [Focus Area(s)].* The CNCS investment of \$[amount of request] will be matched with \$[amount of projected match], \$[amount of local, state, and federal funds] in public funding and \$[amount of non-governmental funds] in private funding.

*If the program is not operating in a CNCS focus area, omit this sentence.

Fixed-Amount grant applicants (EAP, Full-cost Fixed, No Cost Slots) should list their Other Revenue (see Mandatory Supplemental Information) because they are not required to provide a specific amount of match, but still raise significant additional resources to operate the program.

B. Program Design (50 percent)

Reviewers will consider the quality of the application's response to the criteria below. Do not assume all sub-criteria are of equal value.

1. Theory of Change and Logic Model (21 points)

The Theory of Change shall address:

- The proposed intervention is responsive to the identified community problem.
- The applicant's proposed intervention is clearly articulated including the design, dosage, target population, and roles of AmeriCorps members and (if applicable) leveraged volunteers.
- The applicant's intervention is likely to lead to outcomes identified in the applicant's Theory of Change.
- The expected outcomes articulated in the application narrative and logic model represent meaningful progress in addressing the community problem identified by the applicant.
- The rationale for utilizing AmeriCorps members to deliver the intervention(s) is reasonable.

- The service role of AmeriCorps members will produce significant contributions to existing efforts to address the stated problem.

The Logic Model shall depict:

- A summary of the community problem.
- The inputs or resources that are necessary to deliver the intervention, including but not limited to:
 - Locations or sites in which members will provide services
 - Number of AmeriCorps members who will deliver the intervention
- The core activities that define the intervention or program model that members will implement or deliver, including:
 - The duration of the intervention (e.g., total number of weeks, sessions, or months of the intervention)
 - The dosage of the intervention (e.g., the number of hours per session or sessions per week)
 - The target population for the intervention (e.g., disconnected youth, third graders at a certain reading proficiency level)
- The measurable outputs that result from delivering the intervention (i.e. number of beneficiaries served, types and number of activities conducted.) If applicable, identify which National Performance Measures will be used as output indicators
- Outcomes that demonstrate changes in knowledge/skill, attitude, behavior, or condition that occur as a result of the intervention. If applicable, identify which National Performance Measures will be used as outcome indicators.

The logic model is a visual representation of the applicant's theory of change. Programs **should** include short, medium or long-term outcomes. Applicants are not required to measure all components of the Theory of Change. However, the applicant's performance measures should be consistent with the program's Theory of Change and should represent significant program activities. Applicants with multiple interventions should complete one Logic Model that incorporates each intervention. Logic model content that exceeds three pages will not be reviewed.

The application narrative should discuss the rationale for setting performance measures output and outcome targets. Rationales and justifications should be informed by the organization's performance data (e.g., program data observed over time that suggests targets are reasonable), relevant research (e.g. targets documented by organizations running similar programs with similar populations), or prior program evaluation findings.

2. Evidence Base (20 points)

The assessment of an applicant's evidence base has two parts. First, the applicant will be assigned to an evidence tier (see Mandatory Supplemental Information). Second, the quality of the applicant's evidence and the degree to which it supports the proposed program design will be assessed and scored.

Evidence Tier (12 points)

An evidence tier will be assessed for each applicant for the purpose of applying the strategic characteristics (moderate/strong evidence) and understanding the relative strength of each applicant's evidence base and the likelihood that the proposed intervention will lead to outcomes identified in the logic model.

In 2020, the evidence tiers of successful AmeriCorps State and National applicants that were competing were as follows: Strong 26%, Moderate 18%, Preliminary 24%, and Pre-Preliminary 32%. As these figures indicate,

CNCS values and funds programs at all points along the evidence continuum and expects programs to progress along the evidence continuum over time. Thus, do not be deterred from applying for funding due to your current evidence level.

Applicants who have outcome or impact evaluation reports of the same intervention described in the application (see Mandatory Supplemental Information for a definition of “same intervention”) may submit up to 2 of those reports, *plus* (if applicable) the evaluation report from their last three-year grant cycle, to qualify for the Preliminary, Moderate, or Strong evidence tier. To qualify for consideration, the intervention evaluated in the submitted report(s) must match the intervention proposed by the applicant in the following areas, all of which must be clearly described in the Program Design and Logic Model sections of the application:

- Characteristics of the beneficiary population
- Characteristics of the population delivering the intervention
- Dosage (frequency, duration) and design of the intervention, including all key components and activities
- The context in which the intervention is delivered
- Outcomes of the intervention

Submitted reports that do not sufficiently match the intervention proposed by the applicant in all of these areas will not be considered applicable and will not be reviewed or receive any points. Submission of additional documents that are not consistent with the guidance and requirements described in the *Notice* (e.g., advocacy pieces, policy briefs, other narratives that are not research studies or program evaluations) will not be reviewed.

In the Evidence Tier section of the application narrative, applicants must (1) summarize the study design and key findings of any outcome or impact evaluation report(s) submitted and (2) describe any other evidence that supports their program, including past performance measure data and/or other research studies that inform their program design. Applicants who submit evaluation reports for consideration must also describe in the Evidence Base section of the application narrative how the intervention described in the submitted reports is the same as the intervention described in the application (see Mandatory Supplemental Information).

Applicants should provide citations for the studies they describe, if applicable; however, reviewers will not review any documents external to the application other than evaluation report(s) submitted in accordance with the *Notice* instructions.

Applicants must meet all requirements of an evidence tier in order to be considered for that tier. If the evaluation reports submitted by the applicant do not meet the definitions in the Mandatory Supplemental Information, the applicant may be considered for a lower evidence tier.

Evidence Quality (8 points)

After the applicant's evidence tier has been assessed, the quality of the applicant's evidence and the extent to which it supports the proposed program design will be assessed and scored.

For applicants who are assessed as being in the Preliminary, Moderate, or Strong evidence tiers, reviewers will score the submitted evaluation reports using the following standards:

- The submitted reports are of satisfactory methodological quality and rigor for the type of evaluation conducted (e.g., adequate sample size and statistical power, internal and/or external validity, appropriate use of control or comparison groups, etc.);
- The submitted reports describe evaluations that were conducted relatively recently, preferably within the last six years;
- The submitted reports show a meaningful and significant positive effect on program beneficiaries in at least one key outcome of interest.

For applicants who are assessed as being in the Pre-Preliminary evidence tier, reviewers will score the narrative provided in the Evidence Base section of the application using the following standards:

- The applicant uses relevant evidence, including past performance measure data and/or cited research studies, to inform their proposed program design;
- The described evidence is relatively recent, *preferably from the last six years*;
- The evidence described by the applicant indicates a meaningful positive effect on program beneficiaries in at least one key outcome of interest.
- The evidence described by the applicant indicates a meaningful positive effect on program beneficiaries in at least one key outcome of interest.

Applicants assessed in the Pre-Preliminary evidence tier who do not provide adequate responses to the Evidence Quality standards will not meet the threshold requirements for this *Notice* and will not be considered for funding.

All applicants, including new grantees, are required to provide additional information in the Evaluation Summary or Plan field of the application (See Section E. Evaluation Plan); however, information provided in the Evaluation Summary or Plan field will not be scored and will not be reviewed until after funding decisions have been made.

3. Notice Priority (3 points)

- The applicant proposed program fits within one or more of the 2021 AmeriCorps and Montana funding priorities as outlined in the *Funding Priorities* section. AmeriCorps Funding Priorities are more fully described in the Mandatory Supplemental Information. Proposed program must meet all the requirements detailed in the *Funding Priorities* section and in the Mandatory Supplemental Information.

4. Member Experience (6 points)

- AmeriCorps members will gain skills as a result of their training and service that can be utilized and will be valued by future employers after their service term is completed.
- The program will recruit AmeriCorps members from the geographic or demographic communities in which the programs operate.
- Participants will know they are AmeriCorps members; they will be trained on describing their role and position while in service. Staff and community members will know they are AmeriCorps members.
- The applicant will *foster an inclusive service culture where different backgrounds, talents, and capabilities are welcomed and leveraged for learning and effective service delivery.*

C. Organizational Capability (25 percent)

Reviewers will consider the quality of the application's response to the following criteria.

Do not assume all sub-criteria are of equal value.

1. Organizational Background and Staffing (9 points)

- The organization details the roles, responsibilities, and structure of the staff that will be implementing the AmeriCorps program as well as providing oversight and monitoring for the program.

2. Compliance and Accountability (8 points)

- The organization has a monitoring and oversight plan to prevent and detect non-compliance and enforce compliance with AmeriCorps rules and regulations including those related to prohibited and unallowable activities and criminal history checks at the grantee, subgrantee (if applicable), and service site locations.
- The CNCS-required evaluation report meets CNCS requirements (if applicable),
- The CNCS-required evaluation report is of satisfactory quality (if applicable).

3. Culture that Values Learning (4 points)

- The applicant's board, management, and staff collect and use information, including performance data, for learning and decision making.

4. Member Supervision (4 points)

- AmeriCorps members will receive sufficient guidance and support from their supervisor to provide effective service.
- AmeriCorps supervisors will be adequately trained/prepared to follow AmeriCorps and program regulations, priorities, and expectations.

D. Cost Effectiveness and Budget Adequacy (25 percent)

Reviewers will assess the quality of the submitted budget to the following criteria below. Do not assume sub-criteria are of equal value. **No narrative should be entered in the narrative box except for "See budget"**

1. Cost Effectiveness and Budget Adequacy (25 points)

- Budget is submitted without mathematical errors and proposed costs are allowable, reasonable, and allocable to the award.
- Budget is submitted with adequate information to assess how each line item is calculated.
- Budget is in compliance with the budget instructions.
- Match is submitted with adequate information to support the amount written in the budget.
- The budgeted match is equal to or more than the required match for the given program year.
- The cost per MSY is equal to or less than the maximum cost per MSY.

Proposed budgets that contain MSY costs that exceed the maximum cost per MSY and/or less than required match will be considered unresponsive to the application criteria.

Applicants must complete the budget and ensure the following information is in the budget screens:

- Current indirect rate cost if used to claim indirect/administrative costs.
- Identify non-CNCS funding and resources necessary to support the project, including Fixed Amount applicants.
- Indicate the amount of non-CNCS resource commitments, type of commitments (in-kind and/or cash), the sources of these commitments, and if the commitments are proposed or secured.

E. Evaluation Plan (Required for recompeting grantees - 0 percent)

If the applicant is competing for the first time, please provide a data collection plan in the “Evaluation Summary or Plan” field that includes the following:

- A description of the applicant’s data collection system and how it is sufficient to collect high quality performance measurement data during the first three years of the grant. If the applicant does not yet have a data collection system, describe the plan and timeline for developing a high quality system.
- A description of how the applicant will use performance data (including CNCS performance measures and other process and outcome measures if applicable) to improve its program in the first three years.

First-time applicants should be aware that if approved for funding, CNCS may require submission of data collection instruments. Visit CNCS Knowledge Network for information about developing a high-quality data collection plan, <https://www.nationalservice.gov/resources/ameriacorps/building-effective-data-collection-plans-presented-october-12-2017>

If the applicant is recompeting for the first time (see definition of “recompeting” below) the program must submit its evaluation plan in the “Evaluation Summary or Plan” section of the eGrants Narratives. If the applicant is recompeting for a subsequent time, it must submit its evaluation report as an attachment (see *Submission of Additional Documents*) and must also submit an evaluation plan for the next three-year period in the “Evaluation Summary or Plan” field. Evaluations plans submitted outside of eGrants are not reviewed.

Evaluation plans must include as much information as possible for each of the following (see Frequently Asked Questions: Evaluation, <http://www.nationalservice.gov/resources/evaluation/cnsc-evaluation-policies>:

- A short description of the theory of change - why the proposed intervention is expected to produce the proposed results
- Outcome(s) of interest - clear and measurable outcomes that are aligned with the theory of change and will be assessed during the evaluation
- Research questions to be addressed by the study - concrete research questions (or hypotheses) that are clearly connected to the outcomes
- Proposed research design for the evaluation including a rationale for the design selected, an assessment of its strengths and limitations, and a description of the main components;
- Description of the data sources, sampling methods, measurement tools, and data collection procedures that will be used in the evaluation
- Analysis plan that clearly describes the methodology/ies that will be used to analyze the collected data
- A timeline for the evaluation that describes how the evaluation will cover at least one year of CNCS-funded activity and will be completed within the three-year timeframe of the grant
- Qualifications needed for the evaluator
- The proposed budget

Information provided in the Evaluation Summary or Plan field will not be scored but will be Commission staff reviewed with feedback provided case-by-case. For information about evaluation plans visit CNCS Knowledge Network’s Evaluation Resources: <http://www.nationalservice.gov/resources/evaluation/planning-evaluation>

Evaluation requirements differ depending on the amount of the grant, as described in 45 CFR §2522.700-710:

- If the applicant is a State/Territory subgrantee (other than an Education Award Program grantee), and its average annual CNCS program grant is \$500,000 or more, it must arrange for an external impact

evaluation of the program (see Mandatory Supplemental Information), and it must submit the evaluation with any subsequent application to CNCS for competitive funds as required in 45 CFR §2522.730.

- If the applicant is a State/Territory subgrantee and/or National Direct Grantee whose average annual CNCS program grant is less than \$500,000, or an Education Award Program Grantee, it must conduct an internal or an external evaluation of the program, and it must submit the evaluation with any subsequent application to CNCS for competitive funds as required in 45 CFR §2522.730.

For purposes of compliance with evaluation plan and report requirements, an application will be considered a recompeting application if it satisfies the CNCS definition of “same project” (see Mandatory Supplemental Information) and has been funded competitively for at least three years.

- If the applicant has received competitive funding for at least three of the last five years, it will be required to submit an evaluation plan.
- If the project satisfied the definition of same project and the applicant has completed, including at least six years of competitive funding for the same project, the applicant will be required to submit an evaluation report as well as an evaluation plan for the upcoming 3 year grant.
- If the applicant does not satisfy the definition of recompeting, it will not be required to submit an evaluation plan or completed evaluation report.

The “Evaluation Summary or Plan” field of the Narrative does not count toward the page limit of the application; however, it does have a set character limit of 20,000 characters.

State subgrantees and/or National Direct Grantees recompeting for funds may be eligible to apply for approval of an alternative evaluation approach. Grantees requesting approval of an alternative evaluation approach should submit the request along with their evaluation plan in the Evaluation Summary or Plan field in eGrants. CNCS guidance on alternative evaluation approaches is on the CNCS website:

<https://www.nationalservice.gov/documents/2019/ASN-alternative-evaluation-approach-guidance>

If the request for the alternative evaluation approach plus the Evaluation Plan itself will exceed the character limit of the Evaluation Summary or Plan field in eGrants, the applicant should do the following:

- Enter the Evaluation Plan in the Evaluation Summary or Plan field in the system.
- Include a note in the Evaluation Summary or Plan field stating that the applicant is requesting an alternative evaluation approach.
- Include the alternative evaluation approach at the END of the application narrative with the heading “REQUEST FOR ALTERNATIVE EVALUATION APPROACH.” This section of the application narrative will not count against the page limit.

F. Amendment Justification (0 percent)

Enter N/A. This field will be used if the applicant is awarded a grant and needs to amend it.

G. Clarification Information (0 percent)

Enter N/A. This field will be used to enter information that requires clarification in the post-review period.

H. Continuation Changes (0 percent)

Enter N/A if recompeting. This field is used to enter continuation narratives for continuation requests.

Assessment of Continuation Applications

For each continuation application, ServeMontana staff will complete a continuation assessment (Appendix A) that will provide reviewers with critical information about the performance of the grantee. Reviewers will provide each continuation applicant with feedback on the narrative and budget but will primarily score the application based on the information provided in the staff assessment.

1. Budget, Match, and Cost Per MSY, 10 Points

Staff will provide reviewers with information pertaining to the program's performance in relation to their budget. This information will include spending as compared to their budget, ability to meet budgeted match, and the programs cost per MSY as compared to previous operating periods. Applicants should briefly describe any changes to the Budget, Match, or Cost per MSY with rationale.

2. Compliance Findings, 10 Points

Staff will describe compliance issues and areas of weakness/risk identified during the last full year of program operation at the organization, the subgrantees (if applicable), and service site locations (if applicable). If the applicant, its subgrantees, and/or service site locations had compliance or areas of weakness/risk identified, the applicant should provide an explanation, describe the corrective action taken and the plan for improvement. This includes compliance with time sensitive rules for member enrollments and exits.

3. Member Enrollment, 10 Points

If the program enrolled less than 100% of the slots received during its last full program year, the applicant should provide an explanation and describe the plan for improvement in the continuation narrative. Enrollment rate is calculated as slots filled, plus refill slots filled, divided by slots awarded.

4. Member Retention, 10 Points

If the applicant was not able to retain all members during the last full program year, the applicant should provide an explanation and describe the plan for improvement in the continuation narrative. While retention rates may vary among effective programs depending on the program model, the expectation is that programs pursue the highest retention rate possible. Retention rate is calculated as the number of members exited with award (full or partial award) divided by the number of members enrolled.

5. Performance Measure Progress Versus Stated Goals (10 Points)

Staff will describe the applicant's performance against performance measure targets during its last year of program operations. How successful has the applicant been in solving the identified problem? If the applicant did not meet performance targets, provide an explanation and describe the plan for improvement.

Review and Selection Process

Applications cleared through this process will be sent the Corporation for National and Community Service for final funding determination. The review process will consist of:

- OCS staff review Letters of Intent; Additional Documents and Audit Report, as applicable. If the applicant is determined to have sufficient capacity to manage federal grants, they are eligible to continue the application process.

- Submitted applications are reviewed for compliance with pertinent state and federal regulations, and responsibility to the request for proposal. All compliant and responsive applications will continue through the review process.
- Applications passing staff review will next be reviewed by a Grant Review Workgroup responsible for scoring applications and making funding recommendations.
- The Grant Review Workgroup will individually score the applications then convene with applicants present to arrive a consensus scores and a funding recommendation.
- Grant Review Workgroup recommendations are presented to the Montana Commission on Community Service for approval. If the proposal of the review committee is rejected by the Montana Commission the review process may be repeated.

If unforeseen challenges or circumstances make it impossible, impracticable, or inefficient to conduct the review process as planned, OCS and CNCS reserve the right to adjust or make changes to the review process at any time. Adjustments or changes will not affect the selection criteria used to assess applications.

Funding priority will be given to formula continuation applicants

Following formula continuation applications, funding priority will be given to new program and planning applications in order of the consensus scores of the Grant Review Workgroup.

If a competitive recompile applicant is unsuccessful in the competitive grant process and the applicant submitted a Letter Of Intent to be considered under this FFY2021 Formula then the ranking and scores from the competitive review will be upheld.

- If one or more competitive applicants are considered under this FFY2021 Formula Notice as continuations, it is expected that their respective continuation applications will be entered into eGrants during OCS Formula clarification period.
- Formula continuations will receive priority over new planning and program grants.
- If one or more competitive applicants are entered in this formula, the Formula Grant Review Workgroup may recommend partial funding, a planning grant or that OCS request supplemental funds from CNCS.

Review scores will not necessarily have sole bearing on the distribution of funds. However, a lower scoring application will not be recommended for funding at the expense of a higher scoring one. The distribution of funds will be based on the assessment of the Grant Review Workgroup as to how best to carry out the mission of OCS.

When making funding recommendations, the Grant Review Workgroup will consider the score of the application, the effectiveness of the program in addressing Montana's needs, the priorities, if any, set by the Governor and/or State Service Plan, and the input of commission staff.

All applications approved by the Montana Commission to be submitted to CNCS are subject to the following review and selection process:

CNCS will engage Reviewers with relevant knowledge and expertise to assess and provide input on the eligible applications. The review and selection process is intended to produce a diversified set of high-quality programs that represent the priorities and strategic considerations described in this Notice. The determinations made by CNCS reviewers may be different than what the applicant self-determined upon submission of its application.

Initial Application Eligibility Review

OCS will conduct an **initial Eligibility** Review to determine if an application meets the **eligibility** requirements published in this Notice and advances to the next stage of the review process. An application is compliant if the applicant:

- is an eligible organization
- is eligible to submit directly to CNCS
- submitted an application by the submission deadline

Reviewing for eligibility is intended to ensure only those applications that are eligible for award are further reviewed. However, determinations of eligibility can take place at any point during the application review and selection process. Applicants determined to be ineligible will not receive an award.

Internal Review: CNCS staff may evaluate Formula applications using the review criteria and assess priorities and strategic considerations detailed in the *Notice*. Reviewers will be screened for conflicts of interest.

Selection for Funding

OCS and CNCS review and selection process is designed to identify how well eligible applications are aligned with the application review criteria and build a diversified portfolio based on the following strategic considerations:

- CNCS Funding Priorities (See *Funding Priorities*)
- meaningful representation of
 - geographic diversity
 - rural communities
 - single and multi-state programs
 - faith-based organizations
 - focus area representation

Based on the evaluation of these strategic considerations, applications may be selected for funding over applications with a greater degree of alignment with the review criteria. In selecting applicants to receive awards under this Notice, the Montana Commission, and the CNCS Chief Executive Officer will endeavor to include a diverse portfolio of applications based on staff recommendations and strategic considerations.

OCS and CNCS reserve the right to prioritize funding existing awards over making new awards.

OCS and CNCS reserve the right to award applications in an amount other than at the requested level of funding and will document the rationale for doing so.

All applications

Compliance and Eligibility Review CNCS will conduct a Compliance Review to determine if an application meets the requirements published in this *Notice* and advance to the next stage of the review process. Reviewing for eligibility is to ensure that only the applications that are eligible for award are further reviewed. However, determinations of eligibility can take place at any point during the application review and selection process. Applicants that are determined to be ineligible will not receive an award.

Post-Review Quality Control

After the initial review process is complete, CNCS staff will review the results for fairness and consistency. Some applications may be selected for a Quality Control assessment.

Pre-Award Risk Assessment

CNCS staff will evaluate the risks posed by each applicant to assess an applicant's ability to manage federal funds. This evaluation is in addition to assessment of the applicant's eligibility and the quality of its application based on the Selection Criteria. Results from this assessment will inform funding decisions. If CNCS determines that an award will be made to an applicant with assessed risks, special conditions that correspond to the degree of assessed risk may be applied. Additionally, if CNCS concludes the reasons for an applicant having a poor risk assessment are not likely to be mitigated, the application may not be funded.

In evaluating risks, CNCS may consider some of the following criteria:

Due Diligence:

- federal debt delinquency
- suspension and debarment
- information available through OMB-designated repositories of government-wide eligibility qualification or financial integrity information, such as:
 - Federal Awardee Performance and Integrity Information System (FAPIIS)
 - U.S. Treasury Bureau of Fiscal Services
 - System for Award Management (SAM)
 - "Do Not Pay"
- reports and findings from single audits performed under Uniform Administrative Guidance and findings of any other available audits or investigations
- IRS Tax Form 990

Operational and Financial Management:

- financial stability
- [Operational and Financial Management Survey](#)

Past Performance:

- applicant's record in managing previous CNCS awards, cooperative agreements, or procurement awards, including:
- timeliness of compliance with applicable reporting requirements
- accuracy of data reported
- conformance to the terms and conditions of previous federal awards
- applicant's ability to effectively implement statutory, regulatory, or other requirements imposed on award recipients
- meeting matching requirements
- the extent to which any previously awarded amounts will be expended prior to future awards
- *Grant progress reports – attainment of Performance Measures*
- *Enrollment and retention*
- *Monitoring findings - CNCS and/or OIG (if applicable) State Commission (for their subrecipients)*
- *Commission rank*

CNCS may use the results of the review of the risk assessment evaluation in determining which applications to fund. If CNCS concludes that the reasons for applicants having poor risk assessment evaluations are not likely to be mitigated, those applications may not be selected for funding.

Other Programmatic Risks:

- publicly available information, including information from the applicant organization's website

Commission staff should review for the same types of risks for the applicants they submit.

CNCS will assess its re-competing direct grantees related to programmatic past performance. This assessment is in addition to the evaluation of the applicant's eligibility for funding or the quality of its application on the basis of the Selection Criteria. Results from this assessment will inform funding decisions. In evaluating programmatic performance, CNCS may consider the italicized criteria above for applicants that are current formula and competitive grantees.

Commission staff will assess their re-competing subgrantees' programmatic past performance using the italicized criteria above and submit those assessments to CNCS.

Additionally, CNCS may use the results of the review of the risk assessment evaluation in determining which applications to fund.

Consideration of Integrity and Performance System Information

Prior to making any award that exceeds [\\$250,000](#), CNCS is required to review and consider any information about the applicant in the designated integrity and performance system accessible through SAM and FAPIIS (41 U.S.C. 2313). CNCS may expand upon the requirements and use its discretion to review and consider information about any applicant receiving an award, including those under the [simplified acquisition threshold](#).

Any applicant may review information in the designated integrity and performance systems accessible through FAPIIS. An applicant may comment on any information about itself that a Federal awarding agency previously entered and is currently in the designated integrity and performance system accessible through FAPIIS. CNCS will consider comments by any applicant, in addition to the other information in the designated integrity and performance system. CNCS will make a judgment about the applicant's integrity, business ethics, and record of performance under Federal awards when completing its review of risk by the applicant under the Risk Assessment Evaluation section of this *Notice*.

Clarification Process

As a result of the review, prior to OCS submission to CNCS, and again after submission to CNCS, applicants may receive time sensitive requests to provide clarifying information and/or make changes to the application including changes to the budget, performance measures, and budget. This information is used by OCS and CNCS in making final recommendations. Failure to respond to OCS/CNCS clarification requests in a timely manner may result in the removal of application from consideration. Applications may be recommended for funding with or without clarification requests.

Transparency in Grantmaking

The following information for new and re-competing applications will be published on [CNCS Results of Grant Competitions](#) within 90 business days after all grants are awarded:

- a list of all compliant applications submitted
- executive summaries of all compliant applications
- data extracted from the SF-424 Face Sheet
- a blank template of the external review worksheet
- a list of all external reviewers who completed the review process
- a summary of external reviewer comments for successful applications.

Submitted program narratives for successful applications will be available upon request to CNCS.

Federal Award Administration Information

Anticipated Announcement and Federal Award Dates

Depending on availability of funding, CNCS expects that successful State Commissions will be notified no later than early August 2021, contingent on appropriations and CNCS. Applicants will be notified by OCS as to funding decisions. This notification is not an authorization to begin grant activities. A formal *Notice of Grant Award* will be produced and then the state contracting process is initiated.

Uniform Guidance

All awards under this *Notice* are subject to the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance), now consolidated in 2 CFR Parts 200 and 2205.

Requests for Improper Payment Information

To monitor the award or to comply with other legal requirements, such as the Improper Payments Information Act of 2002, as amended, CNCS may, with little notice, request time sensitive documentation from recipients. Failure to make timely responses to these requests may result in award funds being placed on temporary manual hold, reimbursement only, or other remedies as appropriate. In addition, CNCS may, in appropriate circumstances, consider in its funding decisions any previous failures to make timely responses.

CNCS Terms and Conditions

All awards made under this *Notice* are subject to CNCS General Terms and Conditions, and Specific Terms and Conditions for the year and program (when applicable.) The Terms and Conditions contain detailed, mandatory compliance and reporting requirements. All CNCS Terms and Conditions for each of its programs are available at <https://www.nationalservice.gov/resources/terms-and-conditions-cnccs-grants>

National Service Criminal History Check (NSCHC) Requirements

The National Service Criminal History Check (NSCHC) is a screening procedure established by law to protect the beneficiaries of National Service. The law requires recipients to conduct and document NSCHCs on any person (including award-funded staff, national service participant, or volunteer) receiving a salary, living allowance, stipend, or education award through a program receiving CNCS funds. An individual is ineligible to serve in a position that receives such CNCS funding if the individual is registered, or required to be registered, as a sex offender or has been convicted of murder. The cost of conducting NSCHCs is an allowable expense under the award. Failure to conduct compliant NSCHC may result in significant disallowed costs.

Grantees should utilize the two vendors CNCS has engaged to conduct the required NSCHCs. Information on those vendors is here, <https://www.nationalservice.gov/documents/2018/nschc-using-fieldprint-and-truescreen-manual>

Unless CNCS has provided a recipient with a written exemption or written approval of an alternative search procedure, recipients **must** perform the following checks:

All award-grant funded staff, national service participants, and volunteers must undergo NSCHC that include:

1. A nationwide name-based search of the National Sex Offender Public Website (NSOPW)
2. Either
 - a. A name- or fingerprint-based search of the statewide criminal history registry in the person's state of residence and in the state where the person will serve/work; *or*
 - b. A fingerprint-based FBI criminal history check.

Special Rule for Persons Serving Vulnerable Populations.

Award-funded staff, National Service participants, and volunteers *with recurring access to vulnerable populations* (i.e., children age 17 or younger, individuals age 60 or older, or individuals with disabilities) must undergo NSCHC that include:

1. A nationwide name-based check of the [NSOPW](#) and;
2. Both
 - a. A name- or fingerprint-based search of the statewide criminal history registry in the person's state of residence and in the state where the person will serve/work; *and*
 - b. A fingerprint-based FBI criminal history check.

See 45 CFR 2540.200–2540.207 and [CNCS Criminal History Check Resources](#) for complete information and FAQs. Noncompliance with NSCHC requirements has financial consequences that may be significant.

As of December 31, 2019, many pre-approved Alternative Search Procedures (ASPs) and any existing, individual ASP/Exemption requests expired and are no longer available for use.

Use of Material

To ensure materials generated with CNCS funding are available to the public and readily accessible to grantees and non-grantees, OCS and CNCS reserve a royalty-free, nonexclusive, and irrevocable right to obtain, use, modify, reproduce, publish, or disseminate publications and materials produced under the award, including data, and to authorize others to do so. 2 CFR §200.315(b)

Reporting

Cost reimbursement lie item grantees are required to provide mid-year and end of year progress reports, monthly and semi-annual financial reports, and an internal or external evaluation report as required by the AmeriCorps regulations §§2522.500-2522.540 and §§2522.700-2522.740. A final financial report is due at the end of the grant.

Fixed Amount grantees are required to provide monthly financial reports, mid-year and end of year progress reports, and an internal or external evaluation report. A final financial report is due at the end of the grant.

While applications will not be evaluated on these criteria, grantees are expected to have data collection and data management policies and practices that provide reasonable assurance they are providing CNCS with high quality performance measure data. At a minimum, grantees should have policies and practices which address the following five aspects of data quality:

1. The data measures what it intends to measure;
2. The grantee collects data in a consistent manner;
3. The grantee takes steps to correct data errors;
4. The grantee ensures the data reported is complete; and
5. The grantee actively reviews data prior to submission.

Progress Report Data

In addition to semi-annual reporting of progress toward the grant's approved performance measure outputs and outcomes, additional demographic, and narrative data must be reported annually (as applicable), including the number of applicants for AmeriCorps positions and the number of volunteers recruited and/or supported by AmeriCorps members (both episodic and ongoing volunteers.) Failure to submit accurate,

complete, and timely required reports may affect the recipient's ability to secure future OCS and CNCS funding. For further guidance and training resources see – [Resources: Data Collection and Instruments](#).

Re-Focusing Funding

CNCS/OCS reserve the right to refocus funding in the event of disaster or other compelling need for service.

Other Information

In addition to consulting the Application Instructions, Mandatory Supplemental Information, and AmeriCorps regulations, applicants are encouraged to consult the ServeMontana website for updated materials during the RFP period.

Important Notices

Public Burden Statement

Public reporting burden for collection of information under this Notice of Funding is estimated to average six hours per submission, including reviewing instructions, gathering and maintaining the data needed, and completing the application and reporting forms. CNCS informs people who may respond to this Notice of Funding that they are not required to respond unless the OMB control number and expiration date are current valid. (See 5 C.F.R. 1320.5(b)(2)(i).) The OMB Control Number for the information collection is 3045-0187. It expires on 9/30/2020.

Privacy Act Statement

The Privacy Act of 1974 (5 U.S.C § 552a) requires that we notify you that the information requested under this Notice of Funding is collected pursuant to 42 U.S.C. 12592 and 12615 of the National and Community Service Act of 1990 as amended, and 42 U.S.C. 4953 of the Domestic Volunteer Service Act of 1973 as amended. Purposes and Uses - The information requested is collected for the purposes of reviewing grant applications and granting funding requests. Routine uses may include disclosure of the information to federal, state, or local agencies pursuant to lawfully authorized requests. In some programs, the information may also be provided to federal, state, and local law enforcement agencies to determine the existence of any prior criminal convictions. The information may also be provided to appropriate federal agencies and contractors that have a need to know the information for the purpose of assisting the government to respond to a suspected or confirmed breach of the security or confidentiality or information maintained in this system of records, and the information disclosed is relevant and unnecessary for the assistance. Effects of Nondisclosure - The information requested is voluntary; however, to be a recipient of this grant program, disclosure of personal or sensitive information.

OCS and CNCS reserves the right to adjust or make changes to the review process, if unforeseen challenges or urgent circumstances make it impossible, impracticable, or inefficient to conduct the review process as planned. Any adjustments or changes will not affect the selection criteria used to assess applications.

APPENDIX A: Staff Assessment

ServeMontana, the Governor's Office of Community Service *Staff Assessment of Continuation Applications*

AmeriCorps State Grant Applications

Staff will complete the following assessment for all previously funded applicants.

- 1) Applicant:
- 2) Federal Request:
- 3) Total Match:
- 4) Match %:

	Current Grant (2020)	Request (2021)	Difference
Federal Funds			\$0
Cash Match			\$0
In-Kind Match			\$0
Total Match	\$0	\$0	\$0
Match %	#DIV/0!	0%	#DIV/0!
Project Cost	\$0	\$0	\$0
MSY	-		0.00
Cost per MSY	\$0	\$0	\$0

- 5) Areas of Assessment
 - i. Budget, match, and cost per MSY (10 Points)
 - ii. Compliance findings
 - iii. Member enrollment rate and 8 day compliance
 - iv. Member retention and 30 day compliance
 - v. Performance measure performance versus goals

Performance Measure statements	2018 or 2019 Grant Year		
	Target	Actual	Status

Attachment B: Economic Mobility Corps

About the CDFI Fund and CDFIs

The mission of the U.S. Treasury Department's Community Development Financial Institution Fund (CDFI Fund) is to expand economic opportunity for underserved people and communities by supporting the growth and capacity of a national network of community development lenders, investors, and financial service providers known as Community Development Financial Institutions (CDFIs).

CDFIs are community-based financial institutions that have a common goal of filling financing gaps in underserved, low-income areas. As community-based institutions, they possess a keen sensitivity to needs of local residents and businesses, and their creation reflects a bottom-up, rather than a top-down, approach to community investment and revitalization.

Currently, there are more than 1,100 CDFIs that are certified by the CDFI Fund serving urban and rural communities throughout the United States. CDFIs are found in all fifty states, the District of Columbia, Guam, and Puerto Rico. They bridge diverse public and private sector interests to serve people and places that traditional financial institutions usually do not. CDFIs provide:

- loans for businesses and projects that otherwise would not receive for financing;
- safe, affordable banking services that otherwise would not be available in the community;
- loan rates and terms that are more flexible than those offered by traditional lenders; and
- development services—such as business planning, credit counseling, and homebuyer education—to help their borrowers use credit effectively and build financial strength.

As a result, CDFIs support the creation of small businesses and local jobs, and the development of affordable housing, community facilities, and schools—all in places where economic opportunity is needed most.

About the Economic Mobility Corps

A joint initiative of the CDFI Fund and CNCS, the Economic Mobility Corps (EMC) places full-time AmeriCorps members at Certified CDFIs to enhance their capacity to provide financial literacy, financial planning, budgeting, saving, and other financial counseling activities in distressed and underserved areas. Economic Mobility Corps members will be placed in Certified CDFIs and will receive training on the principles of financial counseling and financial literacy. A Certified CDFI is an entity that the CDFI Fund has officially notified that it meets all CDFI certification requirements. Only Certified CDFI's are eligible to receive EMC members. This initiative will fund up to 61 full-time members a year for two years.

Who is Eligible for Award Organizations that meet the AmeriCorps State and National eligibility criteria. Additionally, applicants that are Certified CDFIs and organizations with CDFI Fund awards:

- Will be considered ineligible for award if the applicant has a previously executed award agreement(s), as of the date of the Application, (i) the CDFI Fund has made a determination that such entity is noncompliant or found in default with a previously executed agreement, and (ii) the CDFI Fund has provided written notification that such entity is ineligible to apply for or receive any future CDFI Fund awards or allocations. Such entities will be ineligible to submit an application for such time period as specified by the CDFI Fund in writing. Applicants that have pending noncompliance issues of any of its previously executed award agreement(s), are eligible to receive an award if the CDFI Fund has not yet made a final compliance determination.
- Will be considered ineligible for award if the applicant has defaulted on a loan from the CDFI Fund within five years of the application deadline.

Preference will be given to applicants that intend to enroll veterans as AmeriCorps members and/or serve rural areas.

AmeriCorps Member Position Description

Economic Mobility Corps members will strengthen the capacity of Certified CDFIs to provide financial literacy, financial counseling, and financial planning services offered by the Certified CDFIs, to distressed and underserved individuals. Duties include:

- conducting community outreach and recruitment of new clients to the Certified CDFI's counseling and planning services and programs;
- assisting or conducting one-on-one or group orientation sessions for new program clients to explain the Certified CDFI's services, as well as the responsibilities of the client;
- providing financial planning workshops and individual financial counseling to meet the needs of Certified CDFI clients, including conducting group education meetings, and delivering workshops, webinars and meetings;
- assisting in the development and execution of marketing strategies to promote program client participation in Certified CDFI-sponsored financial counseling and education programs;
- providing program clients with information on the different financial products and services (e.g., loan products, checking/savings accounts, etc.) offered by the Certified CDFI;
- conducting scheduled follow-ups with program clients to ask how they are doing, find out if they need additional help, and to help them stay engaged to achieve their plans by established deadlines;
- performing administrative duties that support the Certified CDFI's activities, including but not limited to, coordinating client meetings, preparing presentations, conducting research, reviewing training and outreach materials, reviewing applications for programs and services, and developing material that supports the Certified CDFI's financial counseling and outreach activity; and
- reporting to the Certified CDFI on a regular basis on activities undertaken by the service member.

Desired Skills

Economic Mobility Corps members should possess:

- a desire and ability to work with a diverse group of people, particularly those living in low-income and economically distressed neighborhoods;
- willingness to learn and serve others;
- ability to successfully work independently and in a team environment;
- strong organizational, writing, and oral communication skills, and possess high attention to detail;
- familiarity with community development, financial services, banking and lending terminology, including an understanding of financial planning basics, credit and credit scoring;
- have an interest in finance and/or financial education;
- computer skills, including high-degree of familiarity with Microsoft Excel, or other spreadsheet software; and
- Bachelor's degree preferred, with coursework in finance, accounting, business, or community development.

End of AmeriCorps State Grant Formula Request for Proposal (RFP)