

## Montana AmeriCorps State FFY2024 Formula Planning Grant

### NOTICE OF FUNDING OPPORTUNITY (NOFO)

This Notice outlines the process to apply for a Montana AmeriCorps *Planning Grant* only. Planning grant funding is provided by the Corporation for National and Community Service (CNCS) doing business as AmeriCorps; administered and overseen by the Montana Governor's Office of Community Service (GOCS) also known as ServeMontana. The level and timing of grant funding is subject to annual appropriations. GOCS 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 Planning Grant funding. ServeMontana's role is to solicit, screen and rank applications. All applications cleared through screening will be ranked and submitted to AmeriCorps for funding determination. A description of the process used by AmeriCorps is contained in this Notice. This Notice should be read together with AmeriCorps Regulations, 45 CFR 2520–2550, Mandatory Supplemental Information, and Application Instructions which are incorporated by reference. It is recommended that applicants review federal regulations at [www.ecfr.gov](http://www.ecfr.gov) and grant management materials on [AmeriCorps' website](#).

#### **Governor's Office of Community Service (GOCS) aka ServeMontana**

Montana's Commission on Community Service was established to administer grants under the National and Community Service Trust Act of 1993, as amended by the Edward M. Kennedy Serve America Act of 2009 and the Montana Community Service Act of 1994 (MCA 90-14-103). Under the Montana Commission on Community Service, GOCS administers funds to AmeriCorps State programs, encourages citizens of all ages, backgrounds, and abilities to engage in service, involves youth in the life and work of communities, and strengthens volunteerism for all Montanans.

#### **Expectations**

ServeMontana expects all applicants to demonstrate the following features:

- ✓ Address rural, Tribal, underserved, or areas of need not currently served by AmeriCorps
- ✓ Clearly connect proposed activities to the needs and priorities in the [Montana State Service Plan](#)
- ✓ Use a collaborative approach to program planning, design, and delivery
- ✓ Planning process is designed to be inclusive of and accessible to individuals with disabilities

#### **Purpose of AmeriCorps Planning Grant Funding**

The purpose of an AmeriCorps Planning Grant is to provide resources to eligible organizations to assess and develop an AmeriCorps intervention to address Montana's needs and develop contributors. Planning Grants are intended to support staff, contractors, travel, and other allowable expenses to assess and plan an AmeriCorps State program and then apply for a program grant. Planning Grants do not provide service positions.

Examples of expected planning activities include needs assessments; collaboration with partners; developing meaningful training; developing data collection systems; developing and aligning policies, procedures, manuals, and adequate financial systems for successful implementation of an AmeriCorps program grant. During the planning grant period, GOCS and/or the planning grantee may determine that AmeriCorps resources are not the

best resource. When completing an application for a Planning Grant, applicants should use this Notice, AmeriCorps Application Instructions, Mandatory Supplemental Information, and other available resources.

### **Who Should Apply to This Notice of Funding Opportunity (NOFO)?**

Organizations proposing to complete a one-year planning period to determine if AmeriCorps State resources are best-suited to meet identified community needs. Organizations with a track record successfully managing federal funds, particularly national service programs, are encouraged to apply.

Applying to this Notice is required for organizations seeking to assess, plan, and proposing to serve within the state of Montana. Tribes and Tribal organizations may apply through this Notice or may choose to apply directly to AmeriCorps for planning funds.

Organizations proposing a program to place members to address Montana's pressing needs are encouraged to apply to the [Montana AmeriCorps Formula Program Notice of Funding Opportunity](#).

### **Montana AmeriCorps State Process and 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 if the applicant's proposal complies with the requirements. Applications will be reviewed to ensure they meet the standards of responsibility in accordance with [ARM 2.5.407](#). If responses do not meet all requirements listed in this Notice, the application may be deemed unresponsive and/or incomplete and will be removed from the review process. Such a determination may be made at any time during the process if information surfaces that would result in the determination of non-responsibility.

### **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 GOCS, *applicants shall only communicate with designated staff listed below regarding this Notice*. Any unauthorized contact may disqualify the applicant.

Kristina Jordan, GOCS Program Officer  
Phone: 406-444-5547  
Email: [kristina.jordan@mt.gov](mailto:kristina.jordan@mt.gov)

Keena Irby, GOCS Fiscal Officer  
Phone: 406-444-1809  
Email: [keena.irby@mt.gov](mailto:keena.irby@mt.gov)

### **Costs/Ownership of Materials**

The applicant is solely responsible for all costs it incurs prior to contract execution. The State shall own all materials submitted in response to this RFP.

### **Associated Documents**

The following documents are referenced throughout this Notice and are available at <https://serve.mt.gov/ameri-corps/ameri-corps-grants/Formula-Planning-Grant>

- FFY2024 Mandatory Supplemental Information
- FFY2024 Montana Planning Grant Application & Performance Measure Instructions
- Letter of Intent
- Operational and Financial Management Survey (OFMS)
- Readiness Self-Assessment
- Budget Worksheet

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## TIMELINE

<b>Mar. 29, 2024</b>	<b>Official posting of the Notice</b>
<b>Mar. 22, 2024</b>	<b><u>Letter of Intent &amp; associated documents due by 5pm Mountain Time</u></b> (see Application and Submission Information in this Notice) <ul style="list-style-type: none"><li>• Letter of Intent (LOI)</li><li>• PDF of current SAM registration &amp; UEI</li><li>• Documentation of Federally Approved Indirect Cost Rate, if applicable</li><li>• Confirmation of most recent Single Audit, as applicable</li><li>• Strategic Plan</li><li>• Organizational Chart</li></ul>
<b>Apr. 1-4, 2024</b>	<b>Written Technical assistance period*</b> Submit questions via email to <a href="mailto:serve@mt.gov">serve@mt.gov</a> .
<b>May 1, 2024</b>	Last day to submit Match Waiver Request
<b>May 2, 2024</b>	<b><u>All applicants: Application Due Date by 5pm Mountain Time</u></b> (see Application and Submission Information in this Notice) <ul style="list-style-type: none"><li>• Complete Application, submitted in eGrants</li><li>• Additional Documents, submitted via email to <a href="mailto:serve@mt.gov">serve@mt.gov</a></li><li>• Operational and Financial Management Survey (OFMS) as a MS Word file</li></ul>
<b>May 15, 2024</b>	<b>Formula Grant Review Workgroup Meeting</b>
<b>May 17, 2024</b>	<b>Special Meeting of the Commission on Community Service</b>
<b>May 20-23, 2024</b>	<b>State of Montana Applicant clarification period</b> – All recommended applicants
<b>May 23, 2024</b>	<b><u>Clarified applications resubmitted in eGrants by 5pm Mountain Time</u></b>
<b>Summer 2024</b>	<b>Applicants notified of funding determination</b>
<b>Aug. 2024</b>	<b>Awards issued to successful applicants</b>

### **\*Technical Assistance**

Applicants should use the technical assistance period 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 upon examination of this Notice of Funding Opportunity.

Participation in the technical assistance period is optional, however, all interested parties should participate. All questions and written responses will be posted publicly at

<https://serve.mt.gov/amicorps/amicorps-grants/Formula-Planning-Grant>.

## STATE SERVICE PLAN, FOCUS AREAS, FUNDING PRIORITIES, & PERFORMANCE MEASURES

### Montana State Service Plan

The Montana State Service Plan outlines the goals and objectives of the Governor's Office of Community Service. Applicants should strive to plan evidence-based service strategies to meet one or more needs identified in the [State Service Plan](#).

### Governor and First Lady Priorities

- [American Indian Affairs](#) – Partner with Tribal Nations and people to help create more and better opportunities. GOCS seeks to engage Tribal members into service with Montana's AmeriCorps programs and foster programs that make real impacts in addressing the diverse needs facing Tribal Nations.
- [Improve Education and Empower Montana's Workforce](#) – Provide resources for K-12 Educators, prepare Montana students for the jobs of tomorrow, and bring our kids and grandkids home to serve in AmeriCorps.
- [Boosting Literacy](#) – Prepare Montanans of all ages to better engage in daily life through development of written communication and reading comprehension skills.
- [Promote Stewardship of Montana's Public Lands](#) – Bring Montanans together in service interventions that result in healthier landscapes, more recreational opportunities, more jobs, less severe wildfires, and improved habitat and water quality.
- [Improve Access to Mental Health Care](#) – Increase Montana's access to mental health care, suicide prevention services, health education, and innovative community strategies.
- [Increase Opportunities for Veterans](#) – Engage veterans in overcoming barriers to employment, connect them with employment opportunities, and provide services to fulfill their hopes and dreams. GOCS seeks programs that make real impacts in addressing the diverse needs facing Montana's veterans and military families.

### Montana Encouraged Planning Elements

- Planning application includes assessing AmeriCorps as a strategy to develop a specific demographic of Montana's workforce (for example, youth aging out of foster care, justice involved youth and adults, adults with literacy related goals, etc.).
- Planning application includes assessing basic professionalism training and leadership skill development to prepare AmeriCorps members for meaningful post-service careers (for example, communication & active listening, networking, receiving and giving feedback, etc.).
- Planning application addresses needs outlined in the Montana State Service Plan (above)

### AmeriCorps Focus Areas

[The National and Community Service Act of 1990, as amended by the Serve America Act](#), emphasizes measuring the impact of service and focusing on a core set of issue areas. To carry out Congress's intent, maximize the impact of investment in national service, and to achieve the goals laid out in AmeriCorps' [Strategic Plan \(2022-2026\)](#), AmeriCorps has the following Focus Areas:

- [Disaster Services](#) Helping individuals and communities prepare for, respond to, recover from, and mitigate the effects of disasters and increase community resiliency.
- [Economic Opportunity](#) Improving economic well-being and security of all individuals.
- [Education](#) Improving educational outcomes for all people, particularly through program designs that support youth engagement and service learning as strategies to achieve high educational outcomes.
- [Environmental Stewardship](#) Supporting communities to become more resilient through measures that reduce greenhouse gas emissions, conserve land and water, increase renewable energy use and improve at-risk ecosystems, especially in underserved households and communities.

- Healthy Futures Supporting for health needs within communities, including aging in place, public health, and addressing childhood obesity, especially in underserved communities.
- Veterans & Military Families Improving quality of life of veterans, military families, caregivers, and survivors.

### Performance Measures

Planning Grant applicants are not required to collect performance measure data during the planning grant period; however, they are required to include Performance Measures in the eGrants application to submit. Specific instructions to complete the module are in Attachment A of the Planning Grant Application and Performance Measure Instructions.

## FEDERAL AWARD INFORMATION

### Program Authority

Awards under this Notice are authorized by the [National and Community Service Act of 1990](#), as amended, ([42 U.S.C. 12501 et seq.](#))

### Available Funds

GOCS generally expects a competitive grant selection process. The actual amount and timing of funds awarded is subject to availability of funds.

### Estimated Award Amount

*Awards for planning grants may not exceed \$100,000.* Funds will be used to support strategic development of an AmeriCorps program (no AmeriCorps member positions). ServeMontana will review applications and determine the appropriate award amount, if any.

### Project and Award Period

Planning grant awards must not exceed 12 months in duration and are not eligible to be continued. ServeMontana expects organizations receiving planning grants may apply for an AmeriCorps program grant in the next grant year or will determine an AmeriCorps program is not the best strategy to meet the stated community need.

The project start date may *not* occur prior to the date AmeriCorps awards the grant. The earliest suggested start date is September 1, 2024. Applicants recommended for funding should plan to complete any hiring and/or contracting processes prior to the start date. While budgets are created for a 12-month period, the subaward agreement between an awarded organization and GOCS will initially be made for a 10 month period, with the opportunity to extend to 12 months in the event the organization applies for a subsequent Formula Program Grant.

### Type of Award

AmeriCorps planning grants are awarded on a line-item budget, cost reimbursement basis. Cost reimbursement grants fund only a portion of the total costs and require documented match.

## ELIGIBILITY, TYPES OF APPLICANTS, AND APPLICATION TYPE INFORMATION

### Eligible Entities

The following non-Federal entities (all of which are defined in [2 CFR 200.1](#)) are eligible to apply:

- Indian Tribes
- State & local governments
- Institutions of higher education
- Nonprofit organizations

## **System for Award Management & Unique Entity Identifier Number**

To receive an award, applicants must register with the [System for Award Management \(SAM\)](#) and maintain an active SAM registration until the application process is complete. If an applicant is awarded a grant, it must maintain an active SAM registration throughout the life of the award. See the [SAM Quick Guide for Grantees](#).

SAM registration must be renewed annually. AmeriCorps suggests applicants finalize a new registration or renew an existing one at least three weeks before the application deadline, to allow time to resolve any issues that may arise. ***Applicants must use their SAM-registered legal name and physical address on AmeriCorps grant applications. The legal applicant's name and physical address in eGrants must EXACTLY match the applicant's SAM-registered information.***

Applications must include an Employer Identification Number and Unique Entity Identifier (UEI). UEI is generated as part of the SAM registration process. *UEI and Dun and Bradstreet (DUNS) numbers are not the same.* Applicants must use “My Account” on the eGrants home screen to enter UEI and EIN numbers in the “Edit Organization’s Attributes” module. These entries will populate the Application’s 424 Face sheet.

AmeriCorps will not award a grant to entities that do not have a valid SAM registration and Unique Entity Identifier. If an applicant has not fully complied with these requirements by the time AmeriCorps is ready to make a federal award, AmeriCorps may determine the applicant is not qualified to receive an award and use that determination as a basis for making a federal award to another applicant.

## **Types of Applicants**

Single State Applicants: Organizations proposing planning activities only in Montana must apply through ServeMontana. Each state and territory commission administers its own selection process and submits the selected applications to AmeriCorps for funding approval. See Mandatory Supplemental Information for applicant descriptions.

### Federally Recognized Indian Tribes in Montana

Indian Tribes proposing to operate only in Montana are eligible to apply to this Notice, or may apply directly to [AmeriCorps Indian Tribes Grants National Direct Opportunity](#). If interested in pursuing an AmeriCorps Indian Tribes Grant, please contact GOCS for more information.

In addition to Indian Tribes (2 CFR §200.54), tribal organizations controlled, authorized, and chartered by Indian Tribes are also eligible to apply. An entity applying on behalf of one or more federally recognized tribe(s) must submit a Tribal Council adopted resolution or other authorization which covers the entire period of performance. The resolution must identify the entity by name as a tribal organization and indicate whether it is controlled, authorized, 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 an AmeriCorps application for the purpose of conducting the activities and providing the services described in the application.

## **Application Types**

### New Application

Organizations seeking to plan to utilize AmeriCorps resources are encouraged to apply to this Montana Formula Planning Grant Notice.

“New Applicant” is defined by AmeriCorps as an applicant that is applying for an AmeriCorps State and National grant for the first time or is a former grantee (non-formula) whose last AmeriCorps State and National grant was received more than five years ago.

Organizations proposing new planning activities and who have previously received AmeriCorps or Corporation for National and Community Service funding have experienced difficulties accessing the Organizations eGrants account or have not been able to create a new application. In either instance, please contact ServeMontana to have the issue resolved.

Organizations seeking an AmeriCorps program to place members in the first year of funding are encouraged to apply to the [Montana Formula Program Grant Notice of Funding Opportunity](#).

### **Required Minimum Thresholds for All Applications**

Applications must meet all threshold requirements. If threshold requirements are not met and no justification is provided, the application may be deemed nonresponsive and will not be reviewed.

- Budget includes travel to the [ServeMontana Symposium](#) for at least one staff person. The ServeMontana Symposium takes place annually in Helena, in March.
  - Budget Section 1 C., Staff Travel, includes mileage and 2-3 nights lodging (depending on distance) at the organization's travel policy rate or at the state rate if applicant does not have a travel policy.
- Budget includes the online AmeriCorps Training Platform [On3Learn AmeriCorps Planning Grant Annual Subscription](#).
  - Budget Section 1. G., Staff Training, includes this cost, currently \$1,500.
- Budget includes staff travel and staff training for at least one primary planning staff, and one fiscal staff to attend the [America's Service Commission's National Service Training](#) (location determined annually). National Service Training is typically held in the springtime for 3 days with 2 to 3 nights hotel stay.
  - Budget Section 1 C., Staff Travel, includes \$750 airfare, per diem, and \$199 per night hotel stay for 2-3 nights.
  - Budget Section 1 G., Staff Training, includes \$400 event registration.
- Budget includes staff training and staff travel (if applicable) for at least one program staff to attend the [Governor's Office of Indian Affairs' Tribal Relations Training](#), held annually in Helena. The training is typically 1-2 days with hotel stay depending on attendee distance.
  - Budget Section 1 C., Staff Travel, includes mileage and lodging (depending on attendee distance) at the organization's travel policy rate or at the state rate if applicant does not have a travel policy.
  - Budget Section 1 G., Staff Training, includes \$150 event registration.

### **Other Eligibility Requirements**

Under Section 132A(b) of [the National and Community Service Act of 1990, as amended](#), organizations that have violated a Federal criminal statute may not receive assistance described in this Notice.

Applications proposing to engage in prohibited activities listed in [AmeriCorps' statutes, regulations](#), or [the terms and conditions](#) of its awards are not eligible to receive AmeriCorps funding. Pursuant to the Lobbying Disclosure Act of 1995, an organization described in the [Internal Revenue Code of 1986, 26 U.S.C. §501 \(c\)\(4\)](#) that engages in lobbying activities is not eligible to apply for AmeriCorps funding. Note that under appropriations provisions annually enacted by Congress, if AmeriCorps is aware that any corporation has any unpaid federal tax liability that 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 entity is not eligible for an award under this Notice. However, this exclusion will not apply to a corporation that a federal agency has considered for suspension or debarment and determined that suspension or debarment is not necessary to protect the interests of the federal government.



## FEDERAL FUNDING RESTRICTIONS AND BUDGET CONSIDERATIONS

### Cost Sharing and Matching

Awarded Planning Grants must generate 24% match in alignment with the Planning Grant Application Instructions. Applicants must demonstrate the ability to meet the match requirement at the time of application. Funds may be from state, local, or private sources; proposed or secured; and cash or in-kind contributions. Proposed and secured match must be entered in the Source of Funds section of the budget narrative in eGrants.

Section 121(e)(5) of National Community Service Act (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 AmeriCorps on a Federal Financial Report (FFR). Grantees must track and be prepared to report on that match separately each year and at grant closeout. GOCS requires documented permission allowing for funds to be used as match from the non-AmeriCorps federal entity.

### Match Waiver

Under certain circumstances, applicants may qualify for a match waiver, detailed in 45 CFR §2521.70. To qualify, applicants must demonstrate the lack of local resource, that this lack is unique, efforts to raise resources, and amount of resources raised at the time of application. *To receive consideration, an alternative match request must be submitted to GOCS by the date specified in the Timeline.*

### Indirect Costs

Budget Section III should include indirect costs. However, no more than five percent of award funds may be used to recover indirect costs on AmeriCorps State grants (45 CFR 2521.95 and 2540.110). Applicants may use the Five/Ten Percent Fixed Administrative Costs, a Federally-approved indirect cost rate, or a 10 percent *de minimis* rate (see Planning Grant Application Instructions), or may claim certain costs directly, as outlined in [2 CFR 200.413](#). States, local governments, and Indian Tribes may use previously approved indirect cost allocation plans. Methods must be applied consistently across all Federal awards. Applicants that have a Federal Negotiated Indirect Cost Rate Agreement or that use the 10 percent *de minimis* rate must enter that information in the Organization section in eGrants. See Application Instructions Attachment B: Detailed Budget Instructions for Cost Reimbursement Grants.

### Preaward Costs

If awarded, applicants may request approval from GOCS to charge the following expenses to the grant prior to the project period:

- Staff time and benefits
- Supplies

If approved, these expenses must be submitted for reimbursement with the first financial report.

## APPLICATION AND SUBMISSION INFORMATION

### How to Submit an Application

Applications must be created and submitted electronically in [eGrants](#). It is *strongly recommended* that applicants initiate and begin the eGrants application well before the deadline. See the Application Instructions for details on creating an application.

*Previously awarded AmeriCorps State grant applicants, including planning grants that request a New Project application, must request GOCS have an application created when the Letter of Intent is submitted or earlier. eGrants may block the Applicants who were previously awarded from creating a new application or may not apply the correct match schedule.*

Applicants should draft the content in 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 from eGrants- *follow the page limits set in this Notice.*

The application's Authorized Representative must be the person who certifies and submits the application and must use their own eGrants account to do so. 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 eGrants account or preparing or submitting the application, contact the AmeriCorps Hotline at 1-800-942-2677 or via [Live Chat or Webform](#). Be prepared to provide the application ID, organization name, and the Notice you are applying to. If the issue cannot be resolved by the deadline, applicants must inform GOCS and continue working with the Hotline to submit the application via eGrants.

### **Content and Form of eGrants Application**

- Standard Form 424 (SF-424) Face Sheet: this populates when an applicant completes the Applicant Info in the and My Organization Info in the Application and My Account portions of eGrants, respectively.
- Narratives:
  - Executive Summary
  - Program Design
  - Organizational Capability
  - Cost Effectiveness and Budget Adequacy
  - Evaluation Summary/Plan
  - Continuation Changes
  - Clarification
- Logic Model
- Budget and Budget Narrative
- Performance Measures
- Authorization, Assurances, and Certification

### **Application Package**

Information necessary to apply is available at <https://serve.mt.gov/ameriCorps/ameriCorps-grants/>. Applicants may email [serve@mt.gov](mailto:serve@mt.gov) or call 406-444-5547 for printed materials or alternative formats.

### **Page Limits**

Page limits are determined by the length of the application as printed from eGrants. The character limits in eGrants fields do not align with page limits set in this Notice – eGrants will allow an applicant to enter text that exceeds page limits. The length of a document in word processing will likely be different than the eGrants printout.

*GOCS strongly encourages applicants to print the Application for Federal Assistance from the "Review and Submit" tab in eGrants prior to submission to confirm it does not exceed the page limits.*

Application & Narratives must not exceed 7 pages as printed from eGrants. Anything beyond 7 pages will not be reviewed. The application sections that count towards the page limit are the:

- SF-424 Face Sheet
- Narrative portions contained in the Executive Summary, Program Design, Organizational Capability, and Cost-Effectiveness & Budget Adequacy sections.

The application page limit does not include the Budget; Budget Narrative; Performance Measures; Continuation, Amendment, Clarification, or Evaluation Plan narrative; or any required additional documents.

## Submission Dates and Times

### Letter of Intent

Applicants must notify GOCS of their intent to apply by **Friday March 22, 2024**. Entities intending to apply must submit the following by email it to [serve@mt.gov](mailto:serve@mt.gov):

- Letter of Intent (LOI), available on the [Montana Formula Planning Grant Webpage](#)
- Readiness Self-Assessment, available on the [Montana Formula Planning Grant Webpage](#)
- Organizational Chart
- Organization's current Strategic Plan
- PDF of current SAM.gov certification and Universal Entity Identifier, <https://www.sam.gov/portal/SAM/#1>
- Current indirect rate cost agreement, *if applicable*
- Confirmation that the organization's most Recent Single Audit is available on the [Federal Audit Clearinghouse](#), as applicable per [2 CFR 200.501](#), or indication that a Single Audit is Not Applicable.

### Application Package

Applications are due in eGrants and Additional Documents emailed to [serve@mt.gov](mailto:serve@mt.gov) by **Thursday May 2, 2024, 5:00pm MST**. Incomplete applications will not be considered. Late applications may not be reviewed, see below.

- This deadline applies to new applicants and includes submission of additional documents (below). GOCS reserves the right to add documents to the RFP and to extend the deadline. Any such changes will be posted on GOCS's website.
- **Once the application is submitted in eGrants, send a confirmation email to [serve@mt.gov](mailto:serve@mt.gov).**

## Additional Documents

Applicants must submit the following additional documents by the application deadline. Items not requested will not be reviewed or returned.

- Operational and Financial Management Survey (OFMS) as a MS Word file, available on the [Montana Formula Planning Grant Webpage](#)
- Two letters of support
- Organizational Chart (If not submitted with Letter of Intent)
- Organization's current Strategic Plan (If not submitted with Letter of Intent)
- PDF of current SAM.gov certification and Universal Entity Identifier (If not submitted with Letter of Intent)
- Current indirect rate cost agreement (If applicable and not submitted with Letter of Intent)
- Readiness Self-Assessment (If not submitted with Letter of Intent)
- Federal debt delinquency (if applicable)
- Confirmation that the organization's most recent Single Audit (If applicable per 2 CFR 200.501, and not submitted with Letter of Intent) is available on the Federal Audit Clearinghouse.

### Additional Documents Formatting and Submission

Additional Documents must be emailed to [serve@mt.gov](mailto:serve@mt.gov) with the subject line: [Legal Applicant Name] – [Application ID number].

Emails should include the following information:

- the legal applicant's name and 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 a header or title within the body of the file that includes the legal applicant name and application ID number
- If the size of an applicant's files requires multiple emails, include an ordering system in the subject line, such as "(1 of 3)"

### Tribal Sanctioning Resolution Additional Documents

Entities applying on behalf of a Federally Recognized Tribe must supply sanctioning resolution adopted by the Tribal Council of each Indian Tribe (See *Eligible Applicants*) by the time the grant is awarded (typically July).

### **Late Applications**

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 AmeriCorps Hotline,
- any information provided to the applicant by the AmeriCorps Hotline, and/or
- any other documentation or evidence that supports the justification.

GOCS must receive the written justification no more than one business day after the submission deadline at [serve@mt.gov](mailto:serve@mt.gov). Applicants must continue working in [eGrants](#) and with the AmeriCorps Hotline to submit the application as soon possible. GOCS 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.

### **Technical Assistance**

GOCS will host technical assistance calls to answer questions about the funding opportunity and eGrants. GOCS strongly encourages all applicants to participate in these sessions. Call-in information will be posted on the [Montana Formula Planning Grant](#) webpage. A written technical assistance period is also available as described in the Notice Timeline.

During the grant application timeline, applicants are encouraged to consult the ServeMontana website for updated materials, the Application Instructions, Mandatory Supplemental Information, and AmeriCorps regulations.

## REVIEW CRITERIA FOR NEW PLANNING GRANT APPLICANTS

- ✓ Each applicant must describe a plan to explore the feasibility of using AmeriCorps resources to effectively meet significant community need(s). Application and budget quality are key factors in determining the funding recommendation.
- ✓ Applications should be based in evidence, which should be cited using in line citations; reviewers will not review any links or documents external to the application.
- ✓ Applications should include a well-designed plan with clear and compelling justification for requesting funds. Reviewers will assess the quality of applications using the review criteria described in this Notice and will rate applications accordingly. Reviewers will also consider the weights assigned to each criterion.
- ✓ Within the application narrative, each narrative subsection heading (see Required Narratives table below) should be included in the narrative text and formatted in ALL CAPITAL LETTERS. Applicants should use subsection points to prioritize the length of information provided in each narrative subsection.
- ✓ Prior to submission, GOCS recommends applicants use the review criteria and/or score sheet to review the application, or to have a peer review. Scoresheets are available on Serve Montana's AmeriCorps Grants page.

**Table: Required Narratives**

Required Narrative Fields	Narrative Subsection	Subsection Points
<b>Executive Summary</b>		Pass/Fail
<b>Program Design</b>	COMMUNITY NEED	15
	RATIONALE & APPROACH	15
	PLANNING PROCESS	15
	NOTICE PRIORITY	5
<b>Organizational Capability</b>	ORGANIZATION BACKGROUND AND STAFFING	25
<b>Cost Effectiveness and Budget Adequacy</b>		25
	<b>TOTAL POINTS</b>	<b>100</b>

### EXECUTIVE SUMMARY (REQUIRED – PASS/FAIL)

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

*The [Name of the organization] proposes a planning grant in the AmeriCorps Focus Area of [list Focus Area]. At the end of the planning period, [Name of the organization] will be responsible for developing an AmeriCorps intervention that will result in [anticipated outcome/benefit and for whom]. Additionally, the organization will learn about AmeriCorps grant and financial management. The organization will complete planning and financial reporting on time.*

*The AmeriCorps 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.*

### PROGRAM DESIGN NARRATIVE (50 POINTS TOTAL)

#### COMMUNITY NEED (15 points)

- The applicant clearly describes a community need, documented with relevant data, and how it is prevalent in communities where AmeriCorps intervention is being planned to be deployed.
- The applicant clearly describes how the community need will be further explored and defined.

#### RATIONALE & APPROACH (15 points)

- The applicant clearly describes why they are applying for an AmeriCorps planning grant and what they intend to achieve during the planning period.
- The applicant describes why an AmeriCorps intervention may be the best solution to address the community need.

#### Planning Process & Timeline (15 points)

The applicant describes a clear and logical planning process and timeline, including:

- An assessment of community members, partner organizations, and stakeholders in the planning process.
- A clear description of how the planning period will be used to develop the necessary components to effectively manage an AmeriCorps intervention in the future. A detailed description of these components, that aligns with GOCS' planning timeline, can be found in Appendix A of this Notice: Montana AmeriCorps Planning Grant Performance Periods, Guidance, and Deliverables.

#### Notice Priority (5 points)

*To receive points for Notice priority, the applicant must show the priority area is a strategic part of the intended outcomes. Proposing activities that align with a given priority or focus area does not guarantee funding.*

- The applicant’s proposed plan fits within one or more of the Montana funding priorities outlined in the State Service Plan, Focus Areas, & Funding Priorities section of this Notice.

#### **Logic Model (0 points)**

- Enter “N/A” in all required narrative boxes in this section of the application in eGrants.

#### **ORGANIZATIONAL CAPABILITY (25 POINTS TOTAL)**

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##### **Organizational Background and Staffing (25 points)**

- The applicant provides a brief history of the organization including the year it was established and any funding history with ServeMontana and AmeriCorps, if applicable.
- The applicant describes the organization’s leadership and staffing structure, and the role of leadership and staff in the planning process.
- The applicant describes prior experience in the proposed area of programming and examples of the organization’s leadership in addressing the identified community need.
- The applicant describes how the person(s) who will conduct the planning process is/are sufficiently qualified, or if they are not yet identified, describes the preferred or desired qualifications.
- The applicant describes sufficient policies, procedures, and controls in place to prevent, detect, and mitigate the risk of fraud, waste, abuse, and mismanagement, such as appropriate segregation of duties, internal oversight activities, measures to prevent timekeeping fraud, etc.

#### **COST EFFECTIVENESS AND BUDGET ADEQUACY (25 POINTS TOTAL)**

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##### **Only enter “See budget” in the narrative box in eGrants. Any other narrative will not be reviewed.**

Reviewers will evaluate the budget and budget narrative against the following criteria:

- Budget complies with the Minimum Thresholds in this Notice as applicable.
- Total CNCS share must not exceed \$100,000.
- Total Grantee share is at least 24% of the total operating cost, applications that do not meet the required match will be considered unresponsive to the review criteria.
- The Source of Funds section total must match the total amount in budget narrative exactly, and follow the directions in the Planning Grant Application Instructions (for each source, designate if the match is secured or proposed; type of classification: cash or in-kind; and source type: Private, Federal, State/Local).

GOCS Staff will conduct a “budget check” on the application’s budget and budget narrative to ensure compliance with the Planning Grant Application Instructions, including checking calculations. Points will not be deducted for budget check deficiencies, but correction must be made during clarification without modifying approved CNCS or Grantee totals.

#### **EVALUATION PLAN (0 POINTS)**

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Enter “N/A”. Any other text entered in this field will not be reviewed.

#### **AMENDMENT JUSTIFICATION (0 POINTS)**

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

#### **CLARIFICATION INFORMATION (0 POINTS)**

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

#### **CONTINUATION CHANGES (0 POINTS)**

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Enter “N/A”.

## APPLICATION REVIEW AND AWARD DETERMINATION PROCESS

All applications approved by the Montana Commission for submission to AmeriCorps are subject to the following review and selection process.

### Montana Application Review

Applications selected through this process will be sent to AmeriCorps for funding approval. The review process will consist of:

- GOCS staff review application for completeness including Letter of Intent, Additional Documents, and Audit Report as applicable, Minimum Thresholds and other requirements as articulated in this Notice. If the applicant appears 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, which will individually score each application then convene with applicants present to arrive at consensus scores, ranking, and a funding recommendation.
- The funding recommendation is presented to the Montana Commission on Community Service for approval. If the funding recommendation is rejected by the 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, GOCS and AmeriCorps reserve the right to adjust or make changes to the review process at any time. Adjustments or changes will not affect the review criteria.***

### Funding Priority

All organizations applying for Montana AmeriCorps Formula Funding are placed into Priority Tiers based on Notice type and organization experience. Within each tier, applicants will be ranked based on consensus scores by the Grant Review Workgroup.

**Table: Funding Priority Tiers**

Priority Tier	Notice Type and Organizational Experience
1	Formula Program Continuation requests
2	Unawarded Montana State Competitive Programs
3	Innovation Grant applicants
4	New/Recompete Formula Program applicants currently administering AmeriCorps Programs or Planning in Montana
5	New Formula Planning Applicants
6	New Formula Program applicants not currently administering AmeriCorps programs or planning in Montana

Review scores will not necessarily have sole bearing on the distribution of funds. However, within each Priority Tier, 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.

GOCS and AmeriCorps reserve the right to award applications in an amount other than the requested level of funding and will document the rationale for doing so. When making funding recommendations, the Grant Review Workgroup will consider the score of the application, the likelihood of planned intervention to address Montana's needs in the State Service Plan, the priorities, if any, set by the Governor, and the input of commission staff.

## **Applicant Clarification & Resolution**

Applicants may receive time sensitive requests to provide clarifying information and/or make changes to the application including the budget, narratives, or performance measures. This information is used in making final recommendations. Failure to respond to GOCS/AmeriCorps clarification or resolution requests in a timely manner may result in the removal of application from consideration. Applications may be approved for funding with or without clarification or resolution requests.

## **Pre-Award Risk Assessment**

AmeriCorps may assess the risks posed by each applicant and assess an applicant's ability to manage federal funds. Results from this assessment will inform funding decisions. If AmeriCorps determines an award will be made to an applicant with assessed risks, then special conditions corresponding to the degree of assessed risk may be applied to the award. Additionally, if AmeriCorps concludes the reasons for applicants having a poor risk assessment are not likely to be mitigated, those applications may not be selected for funding. In assessing risks, AmeriCorps may consider the following criteria:

### Due Diligence, including:

- Federal debt delinquency
- Suspension and debarment
- Information available through Office of Management and Budget (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 \(SAM\)](#)
- Reports and findings from single audits performed under Uniform Administrative Guidance and findings of any other available audits or investigations
- IRS Tax Form 990
- [Oversight.gov](#)
- Public Litigation Records

### Operational and Financial Management:

- Financial stability
- Operational and Financial Management Survey

### Other Programmatic Risks:

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

## **Consideration of Integrity and Performance System Information**

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

Any applicant, at its option, may review information in the designated integrity and performance systems accessible through FAPIIS and 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.



### **Transparency in Grantmaking**

Submitted program narratives, executive summaries, a list of reviewers who completed the review process, and a summary of reviewer comments for successful applications may be available upon request via email to [serve@mt.gov](mailto:serve@mt.gov).

### **Re-Focusing Funding**

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

## **FEDERAL AWARD ADMINISTRATION REQUIREMENTS**

### **Anticipated Announcement and Federal Award Dates**

AmeriCorps will make awards following the selection announcement. AmeriCorps anticipates announcing the results of this funding opportunity in July 2024 to State Commissions, contingent on the availability of congressional appropriations. Applicants will then be notified by GOCS as to funding decisions. This notification is not an authorization to begin grant activities. A formal Notice of Grant Award will be produced and the state contracting process is then initiated.

### **Uniform Guidance**

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

### **Requests for Monitoring or Payment Integrity Information**

AmeriCorps will request documentation from award recipients in order to monitor the grantee and award to ensure compliance with legal requirements, including the [Payment Integrity Information Act of 2019](#). Failure to timely respond to these requests may result in award funds being placed on manual hold, reimbursement only status, or other remedies as appropriate.

### **AmeriCorps Terms and Conditions**

All awards made under this Notice will be subject to the FY2024 AmeriCorps General Terms and Conditions, and the FY2024 AmeriCorps State and National Terms and Conditions. These Terms and Conditions contain detailed, mandatory compliance and reporting requirements. Current versions of the AmeriCorps General and Program-Specific Terms and Conditions for each of its programs is available at <https://americorps.gov/grantees-sponsors/manage-your-grant>.

### **National Service Criminal History Check Requirements**

The National Service Criminal History Check (NSCHC) is a specific screening procedure established by law to protect the beneficiaries of national service.

Planning Grant Applicants are exempt from the NSCHC Requirements but should be aware of them for planning purposes. Successfully Awarded Applicants should still follow organizational background check policies for any staff hired in the process of planning and will be trained on NSCHC by AmeriCorps and GOCS staff as part of the planning process. Full requirements and guidance on how to conduct NSCHC can be found at <https://americorps.gov/grantees-sponsors/history-check>.

### **Official Guidance**

AmeriCorps Guidance is available at: <https://www.americorps.gov/about/agency-overview/official-guidance>. The contents of these documents do not have the force and effect of law and are not meant to bind the public in any way unless incorporated into a contract or grant agreement. These documents are intended only to provide clarity to the public regarding existing requirements under the law or agency policies.

## Use of Material

To ensure materials generated with AmeriCorps funding are available to the public and readily accessible to grantees and non-grantees, GOCS and AmeriCorps 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

Recipients are required to submit a variety of reports which are due at specific times during the life cycle of an award and to close out the award. All reports must be accurate, complete, and submitted on time.

Planning grantees are required to provide periodic progress reports, more information on progress reporting can be found at: <https://serve.mt.gov/ameriCorps/program-management>. Grantees are also required to submit monthly financial reports. A final financial report is due at the end of the grant.

## AGENCY CONTACTS

Montana Governor's Office of Community Service  
PO Box 200801  
Helena, MT 59620

**Program Officer:** 406-444-5547, [kristina.jordan@mt.gov](mailto:kristina.jordan@mt.gov)  
**Fiscal Officer:** 406-444-1809, [keena.irby@mt.gov](mailto:keena.irby@mt.gov)  
**General email:** [serve@mt.gov](mailto:serve@mt.gov)

## IMPORTANT NOTICES

### Public Burden Statement

Public reporting burden for collection of information under this Notice of Funding is estimated to average 80 hours per submission, including reviewing instructions, gathering and maintaining the data needed, and completing the application and reporting forms. AmeriCorps 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\(b\)\(2\)\(i\)](#).) This collection is approved under OMB Control #: 3045-0047, Application Instructions, State and National Competitive, New and Continuation, Expiration Date: September 30, 2023.

### Privacy Act Statement

Per the Privacy Act of 1974 ([5 U.S.C §552a](#)), 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 is required to receive federal benefits.

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

## APPENDIX A: MONTANA AMERICORPS PLANNING GRANT PERFORMANCE PERIODS, GUIDANCE, AND DELIVERABLES



### AmeriCorps Planning Grant Performance Periods, Guidance, and Deliverables for 9/1 start

This document is intended as a guide however does not cover everything, be sure to read and ask questions so we can be partners in success, thank you!

#### Planning Period 1: 9/1 to 12/31

##### Programmatic Deliverables

- Review AmeriCorps Terms and Conditions, reread approved grant and budget, ask questions
- Begin Needs Assessment, strategy, content, audience, timeline, data collection
- Need & Intervention alignment: Identify research and evidence to support the proposed intervention
- Service Foundation Building and Networking: Local & statewide partner scoping, outreach, engagement
- Have appropriate staff read the State Service Plan

##### Fiscal Deliverables

- Review Periodic Expense Report and compare to approved budget
- Develop and/or refine existing Fiscal Management Systems to include federal and nonfederal accounts
- In-kind match policy if applicable

##### Reporting

- Periodic Expense Reports (PER) – see first tab of the PER for instructions and monthly due dates

##### Governor's Office of Community Service (GOCS) Scheduled meetings

- Regular program and fiscal check-ins with GOCS
- Commission Meeting: October & December, see GOCS website Commission page
- Competitive Grant Review (highly recommended): typically, mid-November in Helena

*Double Check! Verify the contract with GOCS is complete and your organization has sent in the Authorized Signature Sheet and Certificate of Insurance.*

#### Planning Period 2: 1/1 to 3/31

##### Programmatic Deliverables

- Program feasibility: Analyze needs assessment data and assess whether AmeriCorps is the resource to meet identified need(s) and how
- Theory of Change & Logic Model: review requirements to hone intervention and program design
- Service site recruitment plan development, site supervisor training outcomes development
- Review AmeriCorps Performance Measure requirements and consider program alignment
- Learn about AmeriCorps Performance Measurement and Data Collection

- Read about National Service Criminal History Checks (NSCHC)

#### Fiscal Deliverables

- Program Match Plan: Tracking and requirements for generating match of proposed program grant

#### Reporting

- Progress report for Performance Period ending 12/31 due 1/20
- Periodic Expense Report

#### Scheduled meetings

- Regular program and fiscal check-ins with GOCS
- ServeMontana Symposium in Helena: visit GOCS website for details
- Montana Commission on Community Service Meeting: typically first day of ServeMontana Symposium

*Think ahead! Begin to outline the Program Grant Application begin writing if applicable.*

### Planning Period 3: 4/1 to 6/30

#### Programmatic Deliverables

- Draft Member Position Descriptions & read about the My AmeriCorps
  - Member Recruitment and Selection Plan
  - Member Enrollment Policy and Procedure
- Service site training and compliance plan
  - Site visits
  - Site support and management
  - Develop site supervisor training plan and timeline
- Operating Program National Service Criminal History Check Policy and Procedure – draft
- Program Compliance Plan

Fiscal Deliverables: Member Service Hours Tracking Plan, what else? Ask questions, please!

- Request for grant extension due May 31 or Close out documents due June 30

#### Reporting

- Progress report for Performance Period ending 3/31 due 4/20
- Periodic Expense Report (PER) monthly, included Federal Financial Report (FFR) ending March 31

#### Scheduled meetings

- Regular program and fiscal check-ins with GOCS
- Montana Commission on Community Service Meeting: June, TBD

*Think ahead! Is your organization planning to apply for a Program Grant? Schedule a consultation with GOCS to let us know if so or why not.*

### Planning Period 4: 7/1 to 8/31

Programmatic Deliverables, if applicable:

- Member & Multisite Management
  - Member Service Agreement
  - Member Training Plan

- ✓ Orientation
- ✓ ServeMontana Symposium
- ✓ Mid-year training
- ✓ Close of Service
- AmeriCorps Branding: Service Gear, Program website
- Member Enrollment Plan and Actively recruiting members (if 9/1 start)
- Site Supervisor Training

#### Fiscal Deliverables

- Member Service Hour Tracking System/tools

#### Reporting:

- Progress report for Performance Period ending 6/30 is due 7/20
- Periodic Expense Report (PER) due monthly

#### Scheduled meetings

- Regular program and fiscal check-ins with GOCS
- Montana Program Director Convening, typically second week in August

#### Grant Closeout

- Progress report for Performance Period ending 8/31 due 9/20 if applicable
  - Federal Financial Report (FFR) due upon closeout
- Close out forms on GOCS website