

# Montana Planning Grant

# APPLICATION INSTRUCTIONS

As applicable to the Notice of Funding Opportunity or Notice of Funding Availability

Based on AmeriCorps State and National Application Instructions for FY2024 Notice of Funding Opportunity

OMB Control #: 3045-0047

Expiration Date: 09/30/2023

## IMPORTANT NOTICE

These application instructions conform to the Corporation for National and Community Service's online grant application system, [eGrants](#). All funding announcements by the Corporation for National and Community Service (AmeriCorps) are posted on [www.nationalservice.gov](http://www.nationalservice.gov) and [www.grants.gov](http://www.grants.gov).

**Public Burden Statement:** Public reporting burden for this collection of information is estimated to average 80 hours per submission, including reviewing instructions, gathering and maintaining the data needed, and completing the form. Comments on the burden or content of this instrument may be sent to the Corporation for National and Community Service, Attn: Arminda Pappas, 250 E Street, SW, Suite 300, Washington, DC 20525. AmeriCorps informs people who may respond to this collection of information that they are not required to respond to the collection of information unless the OMB control number and expiration date displayed on page one are current and valid. (See 5 CFR 1320.5(b)(2)(i).)

**Privacy Act Notice:** The Privacy Act of 1974 (5 U.S.C § 552a) requires that the following notice be provided to you: The information requested on the AmeriCorps Application Instructions is collected pursuant to 42 U.S.C. §§ 12581 - 12585 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 - 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 Department contractors that have a need to know the information for the purpose of assisting the Department's efforts 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. Executive Summaries of all compliant applications received and applications of successful applicants will be published on the AmeriCorps website as part of ongoing efforts to increase transparency in grantmaking. This is described in more detail in the *Notice of Federal Funding Available*. The information will not otherwise be disclosed to entities outside of AmeriCorps without prior written permission. Effects of Nondisclosure - The information requested is mandatory in order to receive benefits.

**Federal Funding Accountability and Transparency Act:** Grant recipients will be required to report at [www.FSRS.gov](http://www.FSRS.gov) on all subawards over \$25,000 and may be required to report on executive compensation for recipients and subrecipients. Recipients must have the necessary systems in place to collect and report this information. See 2 CFR Part 170 for more information and to determine how these requirements apply.

**Indirect Cost Rates:** AmeriCorps allows applicants to include indirect costs in application budgets. Based on qualifying factors, applicants have the option of using a federally approved indirect cost rate, a 10% *de minimis* rate of modified total direct costs, or may claim certain costs directly as outlined in 2 CFR § 200.413 Direct costs. Applicants who hold a federal negotiated indirect cost rate must use that rate in lieu of the AmeriCorps 5/10% allocation of administrative costs.

Applicants who hold a state or federal negotiated indirect cost rate or will be using the 10% *de minimis* rate must enter that information in the Organization section in eGrants (**See Attachment J**).

**Universal Identifier:** Applicants must include a Unique Entity Identifier (UEI) depending on which field(s) are required in eGrants at the time of submission. Applicants must obtain their UEI and register their entity through the System for Award Management (SAM.gov). All grant recipients are required to maintain a valid registration, which must be renewed annually.

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## ATTACHMENTS

***These attachments are worksheets only. All information must be entered in eGrants.***

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## APPLICATION RESOURCES

Please use these application instructions if you are a planning grant applicant to AmeriCorps Montana.

Use these instructions in conjunction with the appropriate *Notice of Funding Opportunity (Notice)*, and the AmeriCorps Regulations, 45 CFR §§ 2520–2550. **The *Notice* includes deadlines, eligibility requirements, submission requirements, and other information that is specific to the grant competition.**

The AmeriCorps regulations include pertinent information (see Table 1, below). The *Notice* can be found on Montana Office of Community Service’s website.

The full regulations are available online at:

<https://www.gpo.gov/fdsys/browse/collectionCfr.action?collectionCode=CFR>

**Table 1: Requirements in the AmeriCorps Regulations**

Topics	Citation in the AmeriCorps Regulations
Member Service Activities	§2520.20 - §2520.55
Prohibited Activities	§2520.65
Tutoring Programs	§2522.900-2522.950
Matching Funds	§2521.35-2521.90
Member Benefits	§2522.240-2522.250
Calculating Cost Per Member Service Year (MSY)	§2522.485
Performance Measures	§2522.500-2522.650
Evaluation	§2522.500-2522.540 and §2522.700-2522.740
Selection Criteria and Selection Process	§2522.400-2522.475

If there is any inconsistency between the AmeriCorps Regulations, the *Notice*, and the Application Instructions, the order of precedence is as follows:

AmeriCorps Regulations 45 CFR §§ 2520–2550 take precedence over the, *Notice of Federal Funding Opportunity/Notice of Federal Funding Availability*, which takes precedence over the Application Instructions.

## SUBMITTING YOUR APPLICATION IN EGRANTS

### NEW APPLICANTS

New applicants must establish an eGrants account by accessing this link:

<https://egrants.cns.gov/espan/main/login.jsp> and selecting “Don’t have an eGrants account? Create an account.”

In eGrants, before Starting Section I you will need to:

- Start a new Grant Application
- Select a Program Area: AmeriCorps
- Select “FY 2024 AmeriCorps State and Territory Commission (New and Cont)”
  - o The correct eGrants listing will state “Due Date: 1/04/2024.” Note while the listing is correct, the deadline is not. Follow the deadlines listed in the *Notice of funding opportunity*.

**The application consists of the following components. Make sure to complete each section.**

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## I. APPLICANT INFO

Information entered in the Applicant Info, Application Info, and Budget sections will populate the SF 424 Facesheet. *If you can only submit your application in hard copy, please follow the instructions in the Notice of Funding Opportunity.*

- If you are applying for the first time, have only received formula funding in the past, or are a former grantee (non-formula) whose last AmeriCorps grant was received more than five years ago, select *New*. (*Note: previous competitive funding history for the same project, even if more than five years ago, may still affect some application requirements; see the Notice of Funding Opportunity for more details*)

Enter or update the requested information in the fields that appear. The contact person needs to be the person who can answer questions about the application.

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## II. APPLICATION INFO

In the Application Info Section enter:

- Areas affected by your proposed program. Please include the two-letter abbreviation with both letters capitalized for the state of Montana, "MT." For city or county information, please follow each one with "MT."
- Requested project period start and end dates. The length of the project period is specified in the *Notice*.
- Under the Applicant Info tab, in the Program Information section, the program title must include "**PLANNING**."
- The Application is Subject to Review by State Executive Order 12372 Process: This is pre-filled as "No, this is not applicable."
- Indicate Yes or No if you are delinquent on any federal debt. If yes, provide an explanation.
- State Application Identifier: Enter N/A.

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## III. NARRATIVES

The narrative section of the application is your opportunity to convince reviewers that your project meets the selection criteria as outlined in the *Notice*. Below are some general recommendations to help you present your project in a way the reviewers will find compelling and persuasive.

- **Lead from your strengths and be explicit.** Do not try to stretch your proposed program description to fit funding priorities and special considerations articulated in the regulations or the *Notice*.
- **Be clear and succinct.** Do not use jargon, boilerplate, rhetoric, or exaggeration. Describe clearly what you intend to do and how your project responds to the selection criteria.
- **Avoid circular reasoning.** The problem you describe should not be defined as the lack of the solution you are proposing.
- **Explain how.** Avoid simply stating that the criteria will be met. Explicitly describe how the proposed project will meet the criteria.
- **Don't make assumptions.** Do not assume the reviewers know anything about you, the proposed program, your partners, or your beneficiaries. Avoid overuse of acronyms.
- **Use an impartial proofreader.** Before you submit your application, let someone who is completely unfamiliar with your project read and critique the project narrative.
- **Follow the instructions and discuss each criterion in the order they are presented in the instructions.** Use headings to differentiate narrative sections by criterion.

In eGrants, you will enter text for

- Executive Summary
- Rationale and Approach (Program Design)
- Organizational Capability
- Cost Effectiveness and Budget Adequacy

Note: The Narratives Section also includes fields for Evaluation Summary or Plan, Clarification Summary, Amendment Justification, and Continuation Changes. **Enter N/A in these fields.**

Reviewers will assess the application against the review criteria in the *Notice*. To best respond to the criteria listed in the *Notice* and Application Instructions, include a brief discussion of each bullet if it pertains to the application.

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## NARRATIVE CATEGORIES

### A. Executive Summary

Complete the executive summary per the instructions in the *Notice*.

### B. Review Criteria

Each application must clearly describe a project that will plan to effectively deploy AmeriCorps members to solve a significant community problem. Specifics about the selection criteria are published in the Notice.

#### 1. Program Design (50 percent)

In assessing Rationale and Approach/Program Design, reviewers will examine the degree to which the applicant demonstrates how the planning period will be used to assess how AmeriCorps members and the proposed intervention are particularly well-suited to addressing the identified community problem.

#### 2. Organizational Capability (25 percent)

Reviewers will assess the extent to which the applicant demonstrates organizational background and staffing and structures, including compliance and accountability, to support the proposed program.

#### 3. Cost Effectiveness and Budget Adequacy (25 percent)

Reviewers will examine the degree to which the budget is cost effective and appropriate for the program being proposed. Enter N/A in the narrative as the assessment will be of the budget.

### C. Evaluation Summary or Plan

Enter N/A.

### D. Amendment Justification

Enter N/A. This field will be used if you are awarded a grant and need to amend it.

### E. Clarification Information

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

Clearly label new information added during clarification with the date.

### F. Continuation Changes

Enter N/A. This field will be used to enter changes in your narratives in your continuation requests.

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## IV. LOGIC MODEL

Enter N/A in all narrative fields of this section. A required task of funded planning grants is to develop a Logic Model for the proposed program.

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## V. PERFORMANCE MEASURES

All applicants must submit performance measures with their application. See Attachment A for instructions for entering performance measures.

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## VI. PROGRAM INFORMATION

In the Program Information Section, applicants must check the relevant boxes to be considered for AmeriCorps' assessment of the strategic considerations and Special Initiatives. Applicants should only check the boxes for those characteristics that represent a significant part of the program.

### **AmeriCorps Funding Priorities**

Check any priority area(s) that apply to the proposed program. Only select Priorities that represent a significant part of the program focus and intended outcomes.

### **Grant Characteristics**

Check any grant characteristics that are a significant part of the proposed program.

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## VII. DOCUMENTS

In addition to the application submitted in eGrants, you are required to provide your evaluation, labor union concurrence (if necessary – see B., below), other required documents listed in the *Notice* (if applicable), and an explanation of federal debt delinquency (if applicable), as part of the application. After you have submitted the documents via the instructions in the *Notice*, change the status in eGrants from the default “Not Sent” to the applicable status “Sent,” “Not Applicable,” or “Already on File at AmeriCorps.”

### **A. Evaluation**

Submit any completed report as described in F., below. Select Evaluation and select “N/A.”

### **B. Labor Union Concurrence**

- 1) If an applicant—
  - a) Proposes to serve as the placement site for AmeriCorps members; and
  - b) Has employees engaged in the same or substantially similar work as that proposed to be carried out by AmeriCorps members; and
  - c) Those employees are represented by a local labor organization  
--then the application must include the written concurrence of the local labor organization representing those employees. Written concurrence can be in the form of a letter or e-mail from the local union leadership.
- 2) If a program applicant:
  - a) Proposes to place AmeriCorps members at sites where they will be engaged in the same or substantially similar work as employees represented by a local labor organization, then the applicant must submit a written description of how it will ensure that:
    - i) AmeriCorps members will not be placed in positions that were recently occupied by paid staff.
    - ii) No AmeriCorps member will be placed into a position for which a recently resigned or discharged employee has recall rights as a result of a collective bargaining agreement, from which a recently resigned or discharged employee was removed as a result of a reduction in force, or from which a recently resigned/discharged employee is on leave or strike.

For the purposes of this section, “program applicant” includes any applicant to AmeriCorps or a State Commission, as well as any entity applying for assistance or approved National Service Positions through an AmeriCorps grantee or subgrantee.

**C. Federally-approved Indirect Cost Agreement**

Applicants applying directly to AmeriCorps that include a federally approved indirect cost rate (IDCR) amount in their budget must enter the current approved indirect cost rate agreement information into eGrants at the same time they submit their application. [See eGrants IDCR User Instructions.](#)

**D. Other Documents**

Provide other required documents list in the *Notice* (if applicable) via the e-mail listed in the *Notice*.

**E. Delinquent on Federal Debt**

Any applicant who checks “Yes” to the question on federal debt delinquency must submit a complete explanation to [serve@mt.gov](mailto:serve@mt.gov) at the same time they submit their application.

**F. Submission Instructions for Evaluations, Labor Union Concurrence, Other Required Documents, and Explanation of Federal Debt Delinquency, as applicable.**

Please submit the required documents to the e-mail listed in the *Notice* using the naming convention and other instructions found there. This information must be received by the deadline in the *Notice*.

VIII. BUDGET INSTRUCTIONS

**A. Match Requirements**

Program requirements, including match requirements, are in the AmeriCorps Regulations and summarized below.

**Table 2: Match Requirements in the AmeriCorps Regulations**

Grant Type	Match Requirement
Cost Reimbursement, line-item budget	Minimum grantee share is 24% of <b>total operating costs</b> . Overall grantee share of total program costs increases gradually beginning in Year 4, to 50% by the tenth year of funding and any year thereafter.

- Grantees are required to meet an overall matching rate that increases over time. You have the flexibility to meet the overall match requirements in any of the three budget areas, as long as the minimum match of 24% for the first three years, and the increasing minimums in years thereafter, are maintained. See 45 CFR §§ 2521.35–2521.90 for the specific regulations.
- **If applying for the first time, you must match with cash or in-kind contributions at least 24% of the project’s total Operating Costs** (Section I) plus Member Costs (Section II) plus Administrative Costs (Section III).
- The acceptable sources of matching funds are federal, state, local, and/or private sector funds in accordance with applicable AmeriCorps requirements.
- In the “Source of Funds” field that appears at the end of Budget Section III, enter the following:
  - ✓ A brief description of the match, identifying each match source separately.
  - ✓ Identify if the match is “secured” or “proposed”.



- ✓ Include dollar amount, the match classification (cash or in-kind), and the source type (Private, State/Local, or Federal) for your **entire match**. (The total amount in the Source of Funds field should match the total amount in the budget narrative **exactly**.)
- ✓ Define all acronyms the first time they are used.

*Note:* AmeriCorps legislation permits the use of non-AmeriCorps federal funds as match for the grantee share of the budget. Please discuss your intention of using federal funds to match an AmeriCorps grant with the other agency prior to submitting your application. Section 121(e)(5) of the National Community Service Act requires that grantees who use other federal funds as match for an AmeriCorps grant report the amount and source of these funds to AmeriCorps. If you use other federal funds as match, you must ensure you can meet the requirements and purpose of both grants. Grantees who use federal funds as match will be required to report the sources and amounts on the Federal Financial Report (FFR).

## **B. Preparing Your Budget**

The proposed budget should be sufficient to perform the tasks described in the narrative. Reviewers will consider the information provided in this section in their assessment of the Cost-Effectiveness and Budget Adequacy review criterion.

Follow the detailed budget instructions in Attachment B to prepare your budget. It is recommended you prepare the budget in the same order as indicated in the Budget Worksheets.

As you enter the detailed budget information, eGrants will automatically populate a budget summary and budget narrative report. Prior to submission, review the budget checklist (Attachment C) to ensure the budget is compliant.

eGrants will perform a limited compliance check to validate the budget. If eGrants finds any compliance issues, you will receive a warning and/or error messages. All errors must be resolved before you can submit the budget.

As you prepare your budget:

- All the amounts you request must be defined for a particular purpose. Do not include miscellaneous, contingency, or other undefined budget amounts.
- Itemize each cost and present the basis for all calculations in the form of an equation.
- Do not include unallowable expenses, e.g., entertainment costs (which include food and beverage costs) unless they are justified as an essential component of an activity.
- Do not include fractional amounts (cents).

Programs must comply with all applicable federal laws, regulations, and the requirements of the Uniform Guidance. Please refer to the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (2 CFR Part 200) for allowable, allocable, and reasonable cost information, as well as, audit requirements, including the need to provide audits to the Clearinghouse if expending over \$750,000 in federal funds. The OMB Uniform Guidance can be found on-line at [https://www.ecfr.gov/cgi-bin/text-idx?tpl=/ecfrbrowse/Title02/2cfr200\\_main\\_02.tpl](https://www.ecfr.gov/cgi-bin/text-idx?tpl=/ecfrbrowse/Title02/2cfr200_main_02.tpl).

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## IX. FUNDING/DEMOGRAPHICS

In the Funding/Demographics Section enter the information requested which could include:

- Other Revenue funds. Enter the amount of funds used to run the program that are not identified on the application budget as CNCS share or grantee share (match). Note: Programs should not enter the total operating budget for their organization unless the entire operating budget supports the AmeriCorps program. Programs that have additional revenue sources not included in the matching funds section of the budget should provide the amount of this additional revenue that supports the program. This amount should not include the CNCS or grantee share amounts in the budget.
- Number of Volunteers Generated by AmeriCorps members. Enter “N/A”

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## X. OPERATING SITES (FOR MULTI-STATE APPLICANTS ONLY)

- Planning grants skip this section.

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## XI. REVIEW, AUTHORIZE, AND SUBMIT

Applicants must submit common federal government-wide Representations and Certifications through SAM.gov. Entities creating new registrations in SAM.gov and existing entities completing their annual registration renewals in SAM.gov are required to review financial assistance representations and certifications before their registration can be activated. As entities renew and re-register their accounts, the data collected make SAM.gov the federal repository for the government-wide information. eGrants requires that you review and verify your entire application before submitting, by completing the following sections in eGrants:

- Review
- Authorize
- Assurances
- Certifications
- Verify
- Submit

Read the Authorization, Assurances, and Certifications carefully. The person who authorizes the application must be the applicant’s Authorized Representative or his/her designee and must have an active eGrants account to sign these documents electronically. An Authorized Representative is the person in your organization authorized to accept and commit funds on behalf of the organization. A copy of the governing body’s authorization for this official representative to sign must be on file in the applicant’s office.

Be sure to check the entire application to ensure there are no errors before submitting. When you verify the application eGrants will generate a list of errors if there are sections that need to be corrected prior to submission. If someone else is acting in the role of the applicant’s Authorized Representative, that person must log into his/her own eGrants account and proceed with Authorize and Submit. After signing off on the Authorization, Assurances, and Certifications, his/her name will override any previous signatory who may appear and show on the application as the Authorized Representative.

**Note: Anyone within your organization who will be entering information in the application at any point during application preparation and submission in the eGrants system must have their own eGrants account.** Individuals may establish an eGrants account by accessing this link: <https://egrants.cns.gov/espan/main/login.jsp> and selecting “Don’t have an eGrants account? Create an account.”

*Note: While planning grants do not collect performance measure data, the Performance Measure Module **must** be completed in accordance with this section to successfully validate the application for submission in eGrants.*

### **Performance Measure Module Home Page**

To start the module, click the “**Begin**” button on the Home Page. The Home Page will summarize the Performance Measure Module and provide links to edit the completed parts of the module. Navigate sections of the module using the tabs at the top of each page. Once the Performance Measure Module has been initiated, clicking “**Continue Working**” will return the user to the last tab when the module was closed. To edit the interventions, objectives, MSYs, and slot allocations, click “Edit objectives/MSYs/Slots.”

### **Objectives Tab**

An expandable list of AmeriCorps Focus Areas appears on this tab. When you select a Focus Area, a list of objectives from the AmeriCorps strategic plan appears. A list of common interventions appears under each objective.

- **To submit the application, you are required to select a Focus Area, an objective, and an intervention.** First click on the Focus Area aligned with the intervention being planned for. Then click on the “Other [Focus Area]” (e.g. Other Education, Other Healthy Futures, etc.) objective dropdown and select the “Other” intervention.
  - If the planning efforts are for Capacity Building, select “Other Community Priorities” focus area.
- At the bottom of the module, select a “Primary Focus Area” and “Primary Intervention.”
- Click “next”

### **Member Service Years (MSY)/Slots Tab**

- In “Total MSY for the Project,” enter “0”
- In the MSY and Members columns, enter “0”
  - *If eGrants gives an error message not allowing the Performance Measure to be validated, enter “1” in these fields.*

### **Performance Measure Tab**

Planning grants are required to enter at least one aligned performance measure (Output and Outcome).

- Select the “Other [Focus Area]” as an objective (e.g. “Other Education”)
- Enter “Planning Grant” in the Performance Measure Title field
- Enter “N/A” in the Problem Statement field
- For the intervention section, click the box and enter “Planning an AmeriCorps Program”
- For the Outputs section, click the circle and enter “Number of grantees engaged in a planning process” in the field
- For the Outcomes section, click the square and enter “Number of grantees that intend to submit an application or an AmeriCorps grant” in the field
- For the number of MSYs and Number of Members fields at the bottom of the module, enter “0”.
- Click “next”

### **Data Collection Tab**

- In the Description of Interventions, enter “N/A”
- Expand the Output accordion:
  - For Select Method, choose “Other”
  - In the Output Instrument Description, enter “N/A”
  - For the Target Number, enter “1”
  - For the Unit of Measure, enter “grantees”

- Expand the Outcome accordion:
  - For Select Method, choose “Other”
  - In Outcome Instrument Description, enter “Self-Assessment by planning grantee”
  - For the Target Number, enter “1”
  - For the Unit of Measure, enter “grantees”
- Click “Mark Complete.” This will return you to the Performance Measure tab.
- Click “Next” to proceed to Summary Tab.

**Summary Tab** The summary tab shows all the information you have entered in the module.

- Print a summary of all performance measures by clicking “Print PDF for all Performance Measures.”
- To print one performance measure, expand the measure and click “Print This Measure.”
- Click “Edit Performance Measure” to return to the Performance Measure tab.
- Click “Edit Data Collection” to return to the Data Collection tab.
- **Click “Validate Performance Measures” to validate this module prior to submitting the application. Performance Measures must be valid and error free to submit the application.**

## SECTION I. PROGRAM OPERATING COSTS

Complete Section I, Program Operating Costs, of the Budget Worksheet by entering the “Total Amount,” “CNCS Share,” and “Grantee Share” for Parts A-I, for Year 1 of the grant, as follows:

### A. Personnel Expenses

Under “Position/Title,” list each staff position separately and provide salary and percentage of effort as percentage of FTE devoted to this award. Each staff person’s role listed in the budget must be described in the application narrative and each staff person mentioned in the narrative must be listed in the budget as either CNCS or Grantee share. Because the purpose of this grant is to enable and stimulate volunteer community service, do not include the value of direct community service performed by volunteers. However, you may include the value of volunteer services contributed to the organization for organizational functions such as accounting, audit work, or training of staff and AmeriCorps members.

### B. Personnel Fringe Benefits

Under “Purpose,” identify the types of fringe benefits to be covered and the costs of benefit(s) for each staff position. Allowable fringe benefits typically include FICA, Worker’s Compensation, Retirement, SUTA, Health and Life Insurance, IRA, and 401K. You may provide a calculation for total benefits as a percentage of the salaries to which they apply or list each benefit as a separate item. If a fringe benefit amount is over 30%, please list covered items separately and justify the high cost. Holidays, leave, and other similar vacation benefits are not included in the fringe benefit rates, but are absorbed into the personnel expenses (salary) budget line item.

#### C. 1. Staff Travel

Describe the purpose for which program staff will travel. Provide a calculation that includes itemized costs for airfare, transportation, lodging, per diem, and other travel-related expenses multiplied by the number of trips/staff. Where applicable, identify the current standard reimbursement rate(s) of the organization for mileage, daily per diem, and similar supporting information. Reimbursement should not exceed the federal mileage rate unless a result of applicant policy and justified in the budget narrative. Only domestic travel is allowable.

GOCS planning grant applicants must include funds in this line item for at least one staff person’s travel to and lodging during the ServeMontana Symposium, depending on travel distance.

Please itemize the costs (show hotel rate and number of nights stay, mileage rate and number of miles to travel, per diem amounts, number of people attending, etc.)

#### C. 2. Member Travel

Leave blank, not applicable to planning grants.

### D. Equipment

Equipment is defined as tangible, non-expendable personal property having a useful life of more than one year AND an acquisition cost of **\$5,000 or more per unit** (including accessories, attachments, and modifications). Any items that do not meet this definition should be entered in Section E. Supplies. Purchases of equipment are limited to 10% of the total CNCS funds requested. If applicable, show the unit cost and number of units you are requesting. Provide a brief justification for the purchase of the equipment under Item/Purpose.

## **E. Supplies**

Include the amount of funds to purchase consumable supplies and materials, including equipment that does not fit the definition in section D. You must individually list any single item costing \$1,000 or more. Grantees may only charge the cost of branded service gear to the federal share if it includes the AmeriCorps Montana logo.

## **F. Contractual and Consultant Services**

Include costs for consultants related to planning activities, except training consultants, who will be listed in Sections G. and H. There is not a maximum daily rate.

### **G. 1. Staff Training**

Include the costs associated with training staff on planning requirements and training to enhance the skills staff need for effective project implementation, i.e., project or financial management, team building, etc. If using a consultant(s) for training, indicate the estimated daily rate. There is not a maximum daily rate.

### **G. 2. Member Training**

Leave blank, not applicable to planning grants.

## **H. Evaluation**

Leave blank, not applicable to planning grants.

## **I. Other Program Operating Costs**

Allowable costs in this budget category should include when applicable:

- Office space rental for projects operating without an approved indirect cost rate agreement that covers office space. If space is budgeted and it is shared with other projects or activities, the costs must be equitably pro-rated and allocated between the activities or projects.
- Utilities, telephone, internet, postage, copying, and similar expenses that are specifically used for AmeriCorps members and AmeriCorps project staff, and are not part of the organization's indirect cost allocation pool. If such expenses are budgeted and shared with other projects or activities, the costs must be equitably pro-rated and allocated between the activities or projects.

## **SECTION II. MEMBER COSTS**

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Planning Grants do not have members on their grants. Leave Section II A and B blank.

### **A. Living Allowance**

Leave blank, not applicable to planning grants.

### **B. Member Support Costs**

Leave blank, not applicable to planning grants.

## **SECTION III. ADMINISTRATIVE/INDIRECT COSTS**

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### **Definitions**

Administrative costs are general or centralized expenses of the overall administration of an organization that receives AmeriCorps agency funds and do not include particular project costs. These costs may include administrative staff positions. For organizations that have an established indirect cost rate for federal awards, administrative costs mean those costs that are included in the organization's indirect cost rate agreement. Such costs are generally identified with the organization's overall operation and are further described in Office of Management and Budget Uniform Guidance.

Indirect costs are an allowable budget item in AmeriCorps grants. Based on qualifying factors, applicants have the option of using a federally approved indirect cost rate, a 10% *de minimis* rate of modified total direct costs or may claim certain costs directly as outlined in 2 CFR § 200.413 Direct costs. Applicants who hold a federal negotiated indirect cost rate must use that rate in lieu of the AmeriCorps 5/10% allocation of administrative costs or the 10% *de minimis* rate. Applicants who hold a state or federal negotiated indirect cost rate or will be using the 10% *de minimis* rate must enter that information in the Organization section in eGrants.

### **Options for Calculating Administrative/Indirect Costs (choose either A, B, OR C)**

Applicants choose one of three methods to calculate allowable administrative costs – a CNCS-fixed percentage rate method, a federally approved indirect cost rate method, or a *de minimis* method. Regardless of the option chosen, the CNCS share of administrative costs is limited to 5% of the total CNCS funds **expended** under this grant. Do not create additional lines in this category.

#### **A. CNCS-Fixed Percentage**

##### **Method Five/Ten Percent Fixed Administrative Costs Option**

The CNCS-fixed percentage rate method allows you to charge administrative costs up to a cap without a federally approved indirect cost rate and without documentation supporting the allocation. If you choose the CNCS-fixed percentage rate method (Section III A in eGrants), you may charge, for administrative costs, a fixed 5% of the total of the CNCS funds expended. To charge this fixed 5%, the grantee match for administrative costs may not exceed 10% of all direct cost expenditures.

1. To determine the maximum CNCS share for Section III: Multiply the sum of the CNCS funding shares of Sections I and II by 0.0526. This is the maximum amount you can request as Corporation share. The factor 0.0526 is used to calculate the 5% maximum amount of federal funds that may be budgeted for administrative (indirect) costs, rather than 0.0500, to mathematically compensate for determining Section III costs when the total budget (Sections I + II + III) is not yet established. Enter this amount as the CNCS share for Section III A.
2. To determine the Grantee share for Section III: Multiply the total (both CNCS and grantee share) of Sections I and II by 10% (0.10) and enter this amount as the grantee share for Section III A.
3. Enter the sum of the CNCS and grantee shares under Total Amount.

#### **B. Federally Approved Indirect Cost Rate**

If you have a federally approved indirect cost rate, this method must be used and the rate will constitute documentation of your administrative costs, not to exceed the 5% maximum federal share payable by AmeriCorps agency. Specify the Cost Type for which your organization has current documentation on file, i.e., Provisional, Predetermined, Fixed, or Final indirect cost rate. Supply your approved IDC rate (percentage) and the base upon which this rate is calculated (direct salaries, salaries, and fringe benefits, etc.). AmeriCorps agency does not restrict the overall indirect cost rate claimed. It is at your discretion whether to claim your entire IDC rate to calculate administrative costs. If you choose to claim a lower rate, please include this rate in the Rate Claimed field.



1. Determine the base amount of direct costs to which you will apply the IDC rate, including both the CNCS and Grantee shares, as prescribed by your established rate agreement (i.e., based on salaries and benefits, total direct costs, or other). Then multiply the appropriate direct costs by the rate being claimed. This will determine the total amount of indirect costs allowable under the grant.

2. To determine the CNCS share: Multiply the sum of the CNCS funding share in Sections I and II by 0.0526. This is the maximum amount you can claim as the CNCS share of indirect costs. If a commission elects to retain a share of the 5% of federal funds available, please note the percentage or amount in the text. There is no separate line item to show this calculation.

3. To determine the Grantee share: Subtract the amount calculated in step 2 (the CNCS share) from the amount calculated in step 1 (the Indirect Cost total). This is the amount the applicant can claim as grantee share for administrative costs.

### **C. De Minimis Rate of 10% of Modified Total Direct Costs**

Organizations who have **never**, at any point in time, held a federally negotiated indirect cost rate (except for those non-Federal entities described in Appendix VII to Part 200—States and Local Government and Indian Tribe Indirect Cost Proposals, paragraph (d)(1)(B)) and who receive less than \$35 million in direct federal funding, may indefinitely use a de minimus rate of 10% of modified total direct costs (MTDC). Additional information regarding what is included in MTDC and use of this option can be found at 2 CFR 200.414(f) and 200.68. If this option is elected, it must be used consistently across all federal awards.

### **Source of Funds**

In the “Source of Funds” field that appears at the end of Budget Section III, enter a brief description of the match, and use the following guidelines:

- Identify each match source separately.
- Identify if the match is “secured” or “proposed.”
- Include dollar amount, the match classification (cash or in-kind), and the source type (Private, State/Local, or Federal) for your **entire match**. (The total amount in the Source of Funds field should match the total amount in the budget narrative exactly.)
- Define all acronyms the first time they are used. The total amount of Source of Match should equal the Grantee Share amount.

## ATTACHMENT C: BUDGET CHECKLIST

This checklist is to help make certain an accurate budget narrative is submitted that meets AmeriCorps requirements.

In Compliance?	Section I. Program Operating Costs
Yes ___ No ___	Costs charged under the Personnel line item directly relate to the operation of the AmeriCorps project? Examples include costs for staff who recruit, train, place, or supervise members as well as manage the project.
Yes ___ No ___	Staff indirectly involved in the management or operation of the applicant organization are funded through the administrative cost section (Section III) of the budget? Examples of administrative costs include central management and support functions.
Yes ___ No ___	Staff fundraising expenses are not charged to the grant? You may not charge AmeriCorps staff members' time and related expenses for fundraising to the federal or grantee share of the grant. Expenses incurred to raise funds must be paid out of the funds raised. Development officers and fundraising staff are not allowable expenses.
Yes ___ No ___ Continued from previous page.	The types of fringe benefits to be covered and the costs of benefit(s) for each staff position are described? Allowable fringe benefits typically include FICA, Worker's Compensation, Retirement, SUTA, Health and Life Insurance, IRA, and 401K. You may provide a calculation for total benefits as a percentage of the salaries to which they apply or list each benefit as a separate item. If the fringe amount is over 30%, the benefits are listed separately?
Yes ___ No ___	Holidays, leave, and other similar vacation benefits are not included in the fringe benefit rates but are absorbed into the personnel expenses (salary) budget line item?
Yes ___ No ___	The purpose for all staff and member travel is clearly identified?
Yes ___ No ___	You have budgeted funds for the Serve Montana Symposium?
Yes ___ No ___	Funds for the purchase of equipment (does not include general use office equipment) are limited to 10% of the total grant amount?
Yes ___ No ___	All single equipment items over \$5000 per unit are specifically listed?
Yes ___ No ___	Justification/explanation of equipment items is included in the budget narrative?
Yes ___ No ___	All single supply items over \$1000 per unit are specifically listed and explained in the budget narrative?
Yes ___ No ___	Does the budget reflect adequate budgeted costs for project evaluation?
Yes ___ No ___	Are all items in the budget narrative itemized and the purpose of the funds justified?

<b>In Compliance?</b>	<b>Section II. Member Costs</b>
Yes ___ No ___	Planning Grants do not have members or member support costs. Is this section left blank?

<b>In Compliance?</b>	<b>Section III. Administrative/Indirect Costs</b>
Yes ___ No ___ Continued from previous page.	Applicant does not have a current federally approved indirect cost rate and has chosen to use the CNCS-fixed percentage method and the maximum federal share of administrative costs does not exceed 5% of the total federal funds budgeted? To determine the federal administrative share, multiply all other budgeted federal funds by .0526.
Yes ___ No ___	Applicant has chosen to use CNCS fixed percentage method and the maximum grantee share is at 10% or less of total budgeted funds?
Yes ___ No ___	Applicant has a current approved indirect cost rate – The maximum grantee share does not exceed the federally approved rate, less the 5% CNCS share?
Yes ___ No ___	Applicant has a current approved indirect cost rate-the type of rate, the IDC rate percentage, the rate claimed and the base to which the rate is applied has been specified?
Yes ___ No ___	Applicant is directly applying to CNCS and the approved indirect cost rate information has been entered into eGrants to support the costs budgeted?
Yes ___ No ___	Applicant has never had a federally approved indirect cost rate and is choosing to use a <i>de minimis</i> rate of 10% of modified total direct costs?

<b>In Compliance?</b>	<b>Match</b>
Yes ___ No ___	Is the overall match being met at the required level, based on the year of funding?
Yes ___ No ___	For all matching funds, proposed vs secured, the source(s) [private, state, local, and/or federal], the type of contribution (cash or in-kind), and the amount of match, are clearly identified in the narrative and in the Source of Funds field in eGrants?
Yes ___ No ___	The amount of match is for the entire amount in the budget narrative? (The total amount of match equals the amount in the budget exactly?)