

## Montana AmeriCorps State FFY2025 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, aka ServeMontana. The level and timing of grant funding is subject to annual appropriations. GOCS reserves the right to modify any component of this Notice and its Associated Documents, 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. This Notice contains a description of the process used by AmeriCorps. This Notice should be read together with AmeriCorps Regulations, [45 CFR 2520–2550](#), Mandatory Supplemental Information, and Application Instructions. See [Associated Documents](#).

#### **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 (Title 90, Chapter 14, Part 1, MCA). In conjunction with 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; and 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 with a track record of successfully managing federal funds that are proposing to complete a one-year planning period to determine if AmeriCorps State resources are best-suited to meet identified community needs. Tribes and Tribal organizations may apply through this Notice or may choose to apply directly to AmeriCorps for planning funds. Applying to this Notice is required for organizations seeking to assess, plan, and proposing to serve within the state of Montana.

Organizations proposing a program to place members only in Montana to address the state'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. GOCS 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 an applicant does 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. A determination may be made at any time if information surfaces that would result in the determination of non-responsibility.

### **Dual Points of Contact**

From the date this Request for Proposal (RFP) is officially posted until an applicant 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. 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)

### **Associated Documents**

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

- FFY2025 Mandatory Supplemental Information
- FFY2025 Montana Planning Grant Application & Performance Measure Instructions
- Planning Letter of Intent Template
- Operational and Financial Management Survey (OFMS)
- Readiness Self-Assessment
- Budget Worksheet
- Match Waiver Request Form

## CONTENTS

<b>Notice of Funding Opportunity (NOFO) Request For Proposals (RFP) .....</b>	<b>1</b>
<b>Timeline.....</b>	<b>4</b>
<b>State Service Plan, Focus Areas, Funding Priorities, &amp; Performance Measures....</b>	<b>5</b>
<b>Federal Award Information .....</b>	<b>5</b>
<b>Eligibility, Types of Applicants, &amp; Application Type Information .....</b>	<b>6</b>
<b>Federal Funding Restrictions and Budget Considerations.....</b>	<b>8</b>
<b>Application Submission Information.....</b>	<b>9</b>
<b>Review Criteria for New Planning Grant Applicants .....</b>	<b>11</b>
<b>Application Review and Award Determination Process .....</b>	<b>14</b>
<b>Federal Award Administration Requirements.....</b>	<b>15</b>
<b>Agency Contacts .....</b>	<b>16</b>
<b>Important Notices .....</b>	<b>16</b>
<b>Appendix A: Montana AmeriCorps Planning Grant Performance Periods, Guidance, and Deliverables.....</b>	<b>18</b>

## TIMELINE

<b>Feb. 19</b>	<b>Planning Grant Informational Call, 10:00 – 11:00 am MST</b>
<b>Feb. 27</b>	<b>Technical Assistance Teleconference, 10:00 – 11:00 am MST</b>
<b>Feb. 28</b>	<b>Official posting of the Notice</b>
<b>Mar. 7</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>• Readiness Self Assessment</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>Mar. 31- Apr. 3</b>	<b>Written Technical assistance period*</b> Submit questions via email to <a href="mailto:serve@mt.gov">serve@mt.gov</a> .
<b>Apr. 17</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 14</b>	<b>Formula Grant Review Workgroup Meeting</b>
<b>May 16</b>	<b>Special Meeting of the Commission on Community Service</b>
<b>May 19-22</b>	<b>State of Montana clarification period</b> – All recommended applicants
<b>May 22</b>	<b><u>Clarified applications resubmitted in eGrants by 5pm Mountain Time</u></b>
<b>Summer 2025</b>	<b>Applicants notified of funding determination</b>
<b>Aug. 2025</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 notice, 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, FUNDING PRIORITIES, FOCUS AREAS, & PERFORMANCE MEASURES

### Montana State Service Plan

The [Montana State Service Plan](#) outlines ServeMontana's goals and objectives, and includes data from a statewide needs assessment that identifies Montana's most pressing needs.

### Governor and First Lady Priorities

- American Indian Affairs: Partner with Tribal Nations and people to help create more and better opportunities. Engage Tribal members into service with AmeriCorps programs and foster programs that address needs facing Montana's Tribal Nations with cultural responsiveness.
- Improve Education and Empower Montana's Workforce: Provide better resources for educators, prepare 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 developing written communication and reading comprehension skills.
- Stewardship of Montana's Public Lands: Support service interventions resulting in healthier landscapes, more recreation opportunities and 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 and provide services for veterans to fulfill their hopes and dreams. Engage veterans into service with AmeriCorps programs and to foster programs that address the diverse needs of veterans and military families.

### Montana Encouraged Planning Elements

- Planning application includes assessing AmeriCorps as a strategy to develop Montana's workforce.
- Planning application includes assessing basic professionalism training and leadership skill development to prepare AmeriCorps members for meaningful post-service careers.

### AmeriCorps Focus Areas

- Disaster Services: Supporting response, recovery, and resiliency in the wake of disasters.
- Economic Opportunity: Improving economic well-being and security of all people.
- Education: Improving educational outcomes for all people, especially children.
- Environmental Stewardship: Serving public lands and people by conserving natural habitats, protecting clean air and water, and reducing utility bills for underserved households.
- Healthy Futures: Supporting health needs within communities, especially in underserved areas.
- 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 must include Performance Measures in the eGrants application to submit. Instructions to complete the module are the Planning Grant Application and Performance Measure Instructions, see [Associated Documents](#).

## 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.](#))

### Estimated Available Funds

GOCS 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). GOCS will review applications and determine whether the requested amount is appropriate.

### Project and Award Period

Planning grant awards must not exceed 12 months in duration and are not eligible to be continued. GOCS expects organizations receiving planning grants may apply for an AmeriCorps program grant in a subsequent 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, 2025. 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 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
- 501(c)(3) Nonprofit organizations

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

All applicants must have a valid [System for Award Management \(SAM\)](#) registration and must maintain an active SAM registration throughout the application process and, if applicable, throughout the life of the award. SAM registration must be renewed annually. Applicants should 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. See the [SAM Quick Guide for Grantees](#).

**Applicants must use their SAM-registered legal name and physical address on AmeriCorps grant applications. The legal applicant name and physical address entered in eGrants must match the applicant's SAM-registered information EXACTLY.**

Applications must include an Employer Identification Number (EIN) and 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 applicants without a valid SAM registration and UEI. If an applicant has not fully complied with these requirements by the time AmeriCorps is ready to make the award, AmeriCorps may not award the 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 selected applications to AmeriCorps for funding approval. See Mandatory Supplemental Information ([Associated Documents](#)) 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.

### **Application Types**

New Application 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 that have previously received AmeriCorps funding may propose new planning activities as a new project. These organizations have experienced difficulties accessing their organizations' eGrants account or have not been able to create a new application. If this occurs, please contact ServeMontana to have the issue resolved.

Organizations seeking an AmeriCorps program to place AmeriCorps members 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. Applications that do not meet all minimum thresholds and provide no justification will not be reviewed.

- Budget includes travel to the [ServeMontana Symposium](#) for at least one staff person if travelling from outside of Helena. The ServeMontana Symposium takes place annually in March, in Helena.
  - 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 for airfare, per diem at the organization's travel policy rate or at the State of Montana's policy rate if applicant does not have a travel policy, and \$199 per night hotel stay for 2-3 nights.
  - Budget Section 1 G., Staff Training, includes \$400 for 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 for event registration.



## Other Eligibility Requirements

- Organizations that have violated a federal criminal statute may not receive AmeriCorps funds.
- Applications that propose activities that are not allowed by AmeriCorps laws, rules, or terms and conditions cannot receive AmeriCorps funding.
- Organizations that have any unpaid federal tax liability are not allowed to receive an award. AmeriCorps cannot provide funding to any corporation that has unpaid federal taxes that are not being paid through an agreement with the relevant tax authority. However, this does not apply if a federal agency decided that a suspension or debarment for the corporation is not necessary.
- Organizations that are described in the [Internal Revenue Code of 1986, 26 U.S.C. §501\(c\)\(4\)](#) that lobby cannot receive AmeriCorps funding according to the [Lobbying Disclosure Act of 1995](#).

## 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 NCSA (42 U.S.C. 12571(e)) requires programs that use other federal funds as match for an AmeriCorps grant to report the amount and source of funds to AmeriCorps on a Federal Financial Report (FFR). Grantees must track and be prepared to report on that match separately 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 15 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 15 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.

### Pre-award Costs

If awarded, applicants may request approval from GOCS to charge the following expenses to the grant prior to the project period. If approved, these expenses must be submitted for reimbursement with the first financial report:

- Staff time and benefits
- Supplies



## APPLICATION AND SUBMISSION INFORMATION

### Application Package

Information necessary to apply is available on the [Montana Formula Planning Grant Webpage](#). Applicants may email [serve@mt.gov](mailto:serve@mt.gov) or call (406) 444-5547 for printed materials or alternative formats.

### 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 the match schedule may not be applied correctly.**

Applicants should draft the application 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 is typically different than what prints out from eGrants. Follow the [page limits](#).

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.

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 AmeriCorps 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
- Performance Measures
- Logic Model
- Budget and Budget Narrative
- Authorization, Assurances, and Certification

### Page Limits

Page limits are determined by the Application for Federal Assistance as printed from eGrants. Character limits in eGrants fields do not align with page limits set in the Notice, and eGrants will allow applicants to enter text exceeding page limits. Document length in word processing will likely be different than the eGrants printout.

*Applicants should print the Application for Federal Assistance from the “Review and Submit” tab in eGrants before submitting to confirm it does not exceed the page limits. Content exceeding the page limits will not be reviewed.* 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 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 **5 pm MST on Friday March 7, 2025**. 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 April 17, 2025, 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 change components of 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. Template forms are available on the [Montana Formula Planning Grant Webpage](#). Items not requested will not be reviewed or returned.

- Operational and Financial Management Survey (OFMS) as a Microsoft Word file
- 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

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

Emails should include:

- 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, within each document,
  - a header,
  - the legal applicant's 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)"

### 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). GOCS will determine whether to accept a late application on a case-by-case basis. Applicants that do not submit a justification or other evidence to overcome the presumption of non-compliance within the timeframe will not be reviewed.

### Technical Assistance

GOCS will host technical assistance calls to answer questions about the funding opportunity and eGrants. All applicants should participate in these sessions. Call 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.

## REVIEW CRITERIA FOR NEW PLANNING GRANT APPLICANTS

- ✓ Application and budget **quality** are key factors in determining the funding recommendation. For tips on preparing quality AmeriCorps applications, see [ServeMontana's Grant Writing Tips and Tricks](#) document.
- ✓ 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 must have a well-designed plan with clear and compelling justification for requesting funds. Reviewers will assess the quality of applications by using the selection criteria below and will consider the weights assigned to each criterion.
- ✓ Applicants should respond to criteria in the order they appear below. Format each narrative subsection heading in ALL CAPITAL LETTERS. Applicants should use subsection points to prioritize the length of information provided in each narrative subsection.
- ✓ Prior to submission, applicants should use the review criteria and/or score sheet to review the application, or to have a peer review. Scoresheets are available on the [Montana Formula Planning Grant](#) webpage.

**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>	COST EFFECTIVENESS & BUDGET ADEQUACY	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 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, **OR**
- The applicant clearly describes how the community need will be explored and defined.

**RATIONALE & APPROACH (15 points)**

- The applicant clearly describes why they are applying for AmeriCorps planning grant funds and what they intend to achieve during the planning period.

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

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

- An assessment involving 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)**

The applicant describes how the proposed program fits within the following:

- The current [Montana State Service Plan](#), and
- If applicable, one or more of the Governor and First Lady funding priorities as outlined in 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)

---

### 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 work 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)

---

### 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.
- 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 total in the Source of Funds section must match the total in the budget narrative exactly.
- The applicant has followed 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 will conduct a “budget check” on the submitted budget and budget narrative to ensure compliance with the Planning Grant Application Instructions, including checking calculations. Proposed budgets that do not meet the required match and do not include all minimum budget threshold items may be considered unresponsive to the application review criteria. If other deficiencies are identified through the budget check, correction must be made during clarification without modifying approved CNCS or Grantee totals.

## EVALUATION PLAN (0 POINTS)

---

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

## AMENDMENT JUSTIFICATION (0 POINTS)

---

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

## CLARIFICATION INFORMATION (0 POINTS)

---

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

## CONTINUATION CHANGES (0 POINTS)

---

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

## 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 the following review process will be sent to AmeriCorps for funding approval.

- GOCS staff review Letters of Intent, Additional Documents, Minimum Thresholds, and other requirements as articulated in this Notice. If it appears the applicant has sufficient capacity to manage federal grants, they may continue in the application process.
- Applications are reviewed for compliance with pertinent state and federal regulations, and responsiveness to the RFP. All compliant and responsive applications will continue through the review process.
- Applications passing staff review will next be reviewed by a Grant Review Workgroup.
- The Grant Review Workgroup will individually score the applications, then convene with applicant representatives present to arrive at consensus scores, ranking of applicants, 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.
- Following approval of the funding recommendation, applicants may receive time sensitive requests to provide clarifying information and/or make required changes to the application.

**If unforeseen circumstances make it impossible, impracticable, or inefficient to conduct the review process as planned, GOCS and AmeriCorps reserve the right to adjust or change the review process at any time. Adjustments or changes will not affect the review criteria.**

## Funding Priority

Applicants will be placed into the following Priority Tiers. Within each tier, applicants will be ranked based on consensus scores by the Grant Review Workgroup, and a lower scoring application will not be recommended for funding at the expense of a higher scoring one.

**Table: Funding Priority Tiers**

Priority Tiers
1. Recommended, but not awarded, Competitive programs
2. Formula program continuation and recompute applicants
3. New Formula program and planning applicants, ranked by consensus scores

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 clarify and/or make changes to the application including the budget and narratives. 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. If AmeriCorps concludes the reasons for an applicant's risk 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**

Before making any award that exceeds \$250,000, AmeriCorps must review and consider information about the applicant from the designated integrity and performance system accessible through SAM.gov. Any applicant may comment on information previously entered by another federal agency in the designated integrity and performance systems accessible through SAM.gov. AmeriCorps may consider applicant comments when completing its review of risk. AmeriCorps may also consider other information about any applicant receiving an award, including those under \$250,000.

#### **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 2025 to State Commissions, contingent on the availability of congressional appropriations. Applicants will then be notified by GOCS of 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 information to ensure compliance with legal requirements, including the [Payment Integrity Information Act of 2019](#). If grantees do not respond timely to these requests, award funds may be placed on manual hold, reimbursement only status, or other restrictions may be applied as appropriate.

## AmeriCorps Terms and Conditions

All grantees and subrecipients must follow the FY2025 AmeriCorps General Terms and Conditions, and the FY2025 AmeriCorps State and National Terms and Conditions. These Terms and Conditions contain mandatory compliance and reporting requirements, [and applicants should review these instructions prior to any grant award](#). Current versions of the AmeriCorps Terms and Conditions are available on the [AmeriCorps 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 NSCHC Requirements but should be aware of them. Successfully Awarded Applicants should still follow organizational background check policies for any planning staff, and will be trained on NSCHC by AmeriCorps and GOCS staff as part of the planning process. Full requirements and guidance can be found at <https://americorps.gov/grantees-sponsors/history-check>.

## Reporting

Recipients are required to submit a variety of reports which are due at specific times during award, and to close out the award. All reports must be accurate, complete, and submitted on time. Planning grantees must submit periodic progress reports and 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 and 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, New and Continuation, Expiration Date: September 30, 2026.

## Privacy Act Statement

The Privacy Act of 1974 [5 U.S.C. §552a](#), requires that applicants are notified that the information requested under this Notice of Funding is collected pursuant to [42 U.S.C. §§12592](#) and 12615 of the [National and Community Service Act of 1990 as amended](#), and [42 U.S.C. §4953](#) of the Domestic Volunteer Service Act of 1973 as amended.

- Purposes and Uses - The information requested is collected for the purposes of reviewing grant applications and granting funding requests. Routine uses may include disclosure of the information to federal, state, or local agencies pursuant to lawfully authorized requests.
- 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.
- 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.

# 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! 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

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