

## **FY 2022 AmeriCorps State and National, Public Health AmeriCorps Best Practices in Budget Development – presentation notes**

### Slide 1

My goal for today's session is to help you, the Public Health AmeriCorps grant applicant, acquire the knowledge and skills needed to understand the function of - and develop - an effective Public Health AmeriCorps budget and budget narrative. Your submission of a complete and high-quality budget will help demonstrate that you have the fiscal capacity to manage an AmeriCorps program.

During this session, I will holistically review the components of an AmeriCorps budget. At the end of this webinar, you should understand how to determine if costs are allowable, reasonable, necessary, and allocable as determined by 2 CFR 200, the Office of Management and Budget's "Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards," frequently referred to as the Uniform Guidance. Using this information and the tips and best practices shared here, you should be prepared to submit a compliant and competitive budget.

### Slide 2

Because the budget and budget narrative become part of the grant recipient's contract with AmeriCorps, we want – and expect - applicants to present a strong and accurate document.

The approved budget will not only serve as a financial guide for grant-supported activities, but it helps to ensure the terms and conditions of the award. In addition to helping AmeriCorps monitor grant and financial compliance, it can serve as a tool for both AmeriCorps and award recipients to



measure progress toward match requirements, when there are match requirements, and monitor budgeted expenses to actual expenses, as part of the budget management process.

### Slide 3

Before I dive into the details of budget development, I want to point out that budget development is just one component of an effective budget management process. Let's take a quick look at the full process.

As you started to work on your Public Health AmeriCorps application, you may have asked yourself, "How do I design a strong budget?" Whether you started the process with that question or not, as part of the pre-award project development process, it's likely that your team already:

- Determined the needs you wanted to address with AmeriCorps resources,
- Set up program or project goals and objectives, and
- Decided on a strategy to accomplish goals.

To develop the budget, applicants must translate that strategy into dollars to prepare a budget aligned with the stated program goals and objectives.

Post award, grantees will continue to manage their budgets effectively by:

- Establishing a budget control process,
- Monitoring expenses, regularly comparing your budgeted to actual expenses to check for over and under spending, and
- Modifying the budget as necessary, with approval from AmeriCorps when required.

Today's conversation will focus the budget preparation process.

### Slide 4

Let's talk about an approved budget. It should be:

- Realistic, that is, it should reflect expected program revenues and expenses and its capacity to carry out program activities; it should be
- Consistent, and aligned with the program's goals and objectives, and it should be
- Flexible – A project's financial and operating circumstances often change, and the budget must adapt to those changing circumstances.



For now, we'll focus on the realistic and consistent features, as they relate to budget design.

A few minutes ago, I outlined the steps “your team” may have taken as part of the budget development process. AmeriCorps encourages applicants to approach budget design as a team activity, engaging various departments based on their individual expertise.

Who did – or who could – you include in your budget design team? For instance,

- Human Resources will have salary, fringe, and Criminal History Check costs,
- The program office may know the costs for training members and delivering services to the community,
- The accounting office will have historical spending rates for specific costs,
- The grants office should be able to review for compliance, and
- Other staff may have additional expertise and can review the budget for clarity.

I realize that, if you are part of a small organization, you may not have all these resources available to you, but you shouldn't undertake budget development in a vacuum, without input from others. Don't be afraid to involve as many others as is required, including your Board of Directors or advisors, to present the most realistic data in the budget and to make sure the document aligns with your programmatic goals and objectives.

AmeriCorps recommends that applicants use historical information when it is possible – and, as a reminder, your accounting department should have that information – adjusting as necessary so that the data is timelier – and include that information, as appropriate, as part of the budget narrative descriptions.

Your strong budget design provides a framework for effective budget management and ensures:

- A realistic scope,
- Appropriate detail,
- A competitive proposal,
- Compliance, and
- Effective delivery. That is, it serves as a guide for program implementation.



In order to create a budget that is strong, accurate, and requires minimal clarification, I encourage you to take your time and engage others in data collection and quality review.

#### Slide 5

As I previously noted, one of the objectives for this session is to provide you with tips and tools for creating a competitive budget narrative.

The first tip is to read and follow the instructions in the Notice of Funding Opportunity, also referenced as the NOFO or Notice, and in the Application Instructions, which include minimum and maximum cost levels and required line items – both of which I will discuss later in this presentation. Within the application instructions, you will find detailed budget instructions for Cost Reimbursement grants in Attachments B and C. The strongest and most compliant Budget Narratives adhere to the guidelines in these documents, which saves all of us time and effort later.

I also encourage you to become familiar with the “Uniform Guidance” – and only include those costs that are allowable, reasonable, necessary, and allocable. You can find this online at [ecfr.federalregister.gov](http://ecfr.federalregister.gov), under Title 2 – Grants and Agreements.

After you and your team estimate the financial resources you need to achieve the stated program goals, you will organize them into the narrative’s budget categories – again, following the guidance in the NOFO and application instructions. As you develop the narrative, remember to provide adequate descriptions and clear calculations. eGrants will automatically populate a budget summary and budget narrative report that should be able to serve as a stand-alone document, without a need to reference the application narrative for explanation. For this reason, I always recommend having someone outside the “budget development team” review this document, to check for holes and inaccuracies.

#### Slide 6

The Uniform Guidance, as well as the NOFO and Application Instructions, specify costs considered unallowable, such as lobbying, entertainment, alcoholic beverages, and fundraising. AmeriCorps strongly encourages applicants to



review the Uniform Guidance, to avoid including unallowable costs in your proposed budget.

Other unallowable costs include those that are not necessary to meet the program objectives. For example, budgeting AmeriCorps Symposium travel expenses for 6 staff members when only four staff are included in the AmeriCorps budget is not allowable and could be waste, fraud, or abuse. Another example is budgeting \$6,000 for landscaping equipment and materials – for a Public Health AmeriCorps program. These are costs that would be considered unreasonable from a “prudent person” perspective or have no logical basis for inclusion in the budget.

### Slide 7

It's important to remember that, if a cost is unallowable as part of the AmeriCorps share, it is also unallowable as part of the grantee share, also referenced, as the cost share or match.

While there is no match requirement for Public Health AmeriCorps grants, applicants may choose to include a grantee share of program costs in the budget, to demonstrate the additional resources required for program operation. Cash and in-kind contributions are acceptable match when they are:

- Necessary and reasonable for proper and efficient accomplishment of project or program objectives,
- Allowable under the Uniform Guidance and Application Instructions,
- Included in the approved budget and allocable under program guidelines, and
- Compliant with the terms and conditions of the award and Uniform Guidance,
- Verifiable from the organization's records,

The matching resources must be treated the same as the AmeriCorps share and consistent treatment includes complete and accurate documentation. A frequently heard phrase in the world of grants management is, “if it isn't documented, it didn't happen.” Please make sure to document all your expenses.

If you choose to include non-AmeriCorps support in your Public Health AmeriCorps application, you must include a Source of Match in the budget



narrative that equals the amount of budgeted match exactly. When populating the Source of Funds section, you will enter a description of the source, along with the amount, a cash or in-kind classification, the type of match source – that is, state or local government, federal funds, or private donations – and confirmation of whether the sources of match are secured or proposed.

### Slide 8

As you enter data into your budget narrative, you will notice that it includes both the AmeriCorps and Grantee share of project costs. Additionally, the budget classifies costs into Direct and Administrative or Indirect cost categories. Direct Costs include program operating costs and member costs, which the budget breaks into major categories that may include specific line items, such as those on the slide. These costs are allocable to the grant, that is, they are associated with grant-related goals and activities. General or centralized organizational expenses, spread across the entire organization in support of common goals, are Indirect or Administrative Costs.

As you – the Public Health AmeriCorps applicant - develop your budget management systems and, specifically, the budget control process that I referenced earlier, you will want to establish clear policies and procedures for tracking and documenting these expenses.

### Slide 9

I will now review the specific budget categories and the related guidance in the AmeriCorps Application Instructions, beginning with Section One – the Program Operating Costs.

In Section A. Personnel Expenses – you will individually list each staff position supported by the grant and provide the annual salary and level of effort as a percentage of the full-time equivalent or FTE devoted to this award. Please remember to:

- Only include positions supported by the application narrative and
- Make sure not to include the value of direct community service performed by volunteers, unless it is for organizational functions, such as accounting, auditing, or training.
- In addition, if you have other AmeriCorps grants, it's a good idea to confirm that you are not over budgeting – that is, including more than 100% of staff time – on your budgets. You can do this by including a



statement in each line or at the end of the section that states, “The percentage of time allocated to budgeted staff does not exceed 100% across all AmeriCorps grants.” Additionally, you should confirm that the salary information you provide is consistent across the multiple grants. While it may be appropriate to budget the Executive Director’s salary as \$89,000 on one application and \$99,000 on the application you submit six months later, you could add an explanation that the higher salary reflects a Cost of Living and performance-related salary increase for additional clarification.

In Section B. Fringe – you will identify the type of fringe benefit (for example, FICA, Health and Life Insurance, Workers Compensation, State Unemployment, and Retirement costs) and the cost for each staff.

- Note that Fringe Benefit costs should align with salary lines. That is, this section should only include staff included in the Personnel Expenses section.
- If benefit amount is more than 30% of the salary costs, you must list covered benefits separately and justify the cost. For example, you might state, Health insurance at 24%, retirement at 10%, and FICA at 7.65%, - rather than noting that all fringe benefits are 41.65% of the related salary costs.

In Section C. Travel – Please include the purpose of costs and type of travel cost (such as airfare, ground transportation, lodging, or per diem), the number of trips, and the number of staff or members travelling. Make sure this calculation is clear and simple to follow.

- Note that attendance at AmeriCorps sponsored technical assistance events is an expectation of all direct grantees and travel funds should be budgeted for new grantees and new staff of existing grantees to attend the AmeriCorps Symposium pre-conference events.
- Take care to separate staff and member travel costs – and ensure that training costs are not included in this section (and that travel costs aren't included in the training lines).
- You may budget mileage at a rate higher than the federal reimbursement rate (which is \$.56/mile as of 01/01/2021) if that follows your organization’s policy. If so, make a note in the budget narrative.

Section D. Equipment – expenses are 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. If less, the expense goes in the Supplies section.



Equipment is limited to 10% of total AmeriCorps funds requested. You must show the unit cost and number of units with purpose of equipment in your budget.

Section E. Supplies – costs are consumable supplies and materials, including member service gear.

- AmeriCorps identity items, preferably clothing with an AmeriCorps logo, is a required budget expense and may be charged to the AmeriCorps share only if it includes the AmeriCorps logo. Applicants should make a note in the budget narrative when items include the AmeriCorps logo.
- You may charge safety gear to the AmeriCorps share, regardless of whether it has a logo. Organizations must purchase any non-logged member service gear with non-AmeriCorps funds.
- Make sure to individually list single items costing \$1,000 or more.

In Section F. Contractual/Consultant Services – you will include all contractual and consultant services, except training and evaluation consultants.

- While AmeriCorps does not impose a maximum daily rate, we ask that you include the basis on which you determined the expense – which may be a daily rate.
- Again, do not include the value of direct community service performed by volunteers – here or in the Personnel Expenses section – unless it is for organizational functions, such as accounting, auditing, or equipment maintenance.

Section G. Training – includes expenses related to both staff and member training.

- Staff Training will enhance staff skills for effective project implementation.
- Member Training supports members as they carry out their service activities and may include Life after AmeriCorps training.
- Be sure to include a daily rate for consultants, if used. If it is not used, enter some type of detail to justify the cost.

Section H. Evaluation – includes project evaluation costs, including additional staff, consultants, evaluation instruments, etc. This is not for assessing progress toward performance measures, but an evaluation of impact on the community and assessment of the overall program design/systems. Include daily rate for consultants, if used.



Section I. Other Program Costs – is a bit of a “catch all” category, for those projected expenses that don’t neatly fit in the other categories. In this section, you:

- Must include National Service Criminal History Checks for members, employees, and others who receive a salary, education award, living allowance, or stipend. If not included, explain how costs are covered (or that the checks are already completed).
- You may include office space, utilities, phone, and internet, and similar expenses for members and project staff, providing expenses are not included as part of an organization’s approved indirect cost rate and that they are pro-rated and appropriately allocated to the project.
- You may also include member recognition costs, which are allowable if appropriately justified and if they exclude gifts and food provided in an entertainment setting.
- Finally, multi-state applicants may include subgrants, indicating the approximate number and average amount of the awards. Show any required subgrantee match in the “grantee share” column.

#### Slide 10

Let’s review some budget narrative sample entries and talk through some of common clarification issues that applicants can avoid. This Staff Travel section includes a number of errors.

- The applicant included the AmeriCorps-Sponsored Grantee Training but neglected to include a cost calculation to explain how they determined the \$2,930. (While it is a required line item, the costs may not meet the “prudent person” standard. For example, what if this line item was for a training in Washington DC and the travelers were located in Northern VA. Would \$2,930 be reasonable?)
- In the second line item, the applicant proposed a mileage rate higher than the federal rate. This is allowable, providing that it aligns with the organization’s policy. This applicant could avoid having to clarify the rate by making a budget narrative notation that this follows the organization’s travel policy. An example of that is included in the last line of the section.
- The third line item shows that the applicant did not double-check the calculations for accuracy. The details in the description total \$2,050 – rather than the budgeted \$1,954. This often results when applicants revise the budget sections – which is why you cannot double-check your calculations too many times.



- The last line in this section includes costs for Member Travel. While Member Travel is an allowable cost – and this is an appropriately detailed entry – there is a specific Member Travel section. It's important to check that you are entering line items in the appropriate section.

The example at the bottom shows a correct and comprehensive entry. Adequate detail is included for each line item, including the number of individuals traveling, the number of travel days or miles travelled and mileage rate, all calculations total the budgeted amounts, and no erroneous costs are included in this section.

### Slide 11

Here is a sample from the Supplies section of a budget narrative. Take a moment to consider which, if any, of the costs shown here may require clarification after AmeriCorps reviews these line items.

- In the first line, the applicant provided an average monthly cost of the office supplies, but the calculation is incorrect. It appears to be based on only 10 months of costs.
- The computers line item is budgeted at \$2,200 and includes no detail. How many computers are they proposing to buy? Is this line for just computers or are other items included? Without this detail, we can't determine if the cost is reasonable and necessary. Also, remember that the application instructions state that applicants must specifically list all single supply items with a cost of more than \$1,000 per unit.
- The member supplies section includes a cost per member and the number of members – which is great – however, when you calculate this, it totals a bit higher than what is budgeted, \$7,030. Because AmeriCorps budget reviews include an assessment of calculation accuracy, I recommend adding a term such as “average” or “approximate” to this description, such as that included in the Office Supplies line, to provide some flexibility.
- Are there any required budget items missing from this section? What about the AmeriCorps member service gear?

The second version includes the member gear, with the appropriate detail. The additional revisions include the corrected office supplies calculation, details about the computers, and the term “approximate” in the member supply line. This is a much better and more compliant budget narrative section.



You'll notice that both of the examples shared here include Grantee Share budgeted costs. Again, Public Health AmeriCorps applicants are not required to include any match in your proposed budget, but if you choose to, it might look something like what is in these examples.

### Slide 12

Let's move on to Section Two, which focuses on Member Costs, specifically member living allowances and support costs.

The NOFO stipulates the minimum and maximum living allowances. For example, it states that the Public Health AmeriCorps full-time living allowance ranges between \$16,502 and \$33,004 per member. The budget narrative must identify the number of members in each category and the living allowance amount they will receive. And, as a reminder, the Public Health AmeriCorps NOFO only allows for full-time, three-quarter time, half-time, and reduced half-time member types.

Member Support Costs – must follow the laws of the states where members serve.

- FICA, unless exempted by IRS, is 7.65% of the total living allowance.
- You must offer Health Care to all FT members. Programs may not pay healthcare benefits to less-than-FT members with grant funds – unless those less-than-FT members are serving in a FT capacity for a sustained period of time, such as in a FT summer program. In that case, you should note that in the budget narrative. Please include the number of members receiving the benefit and a per person cost in the cost calculation. If you calculate costs based on the percentage of members that historically accept or that you anticipate will accept this benefit, make sure to note that in the justification.
- You may include Workers Compensation costs if the state where members are serving requires it. If it is not required, programs must obtain Occupational, Accidental, Death and Dismemberment coverage for members. Be aware that it is the applicant's responsibility to check with the state Department of Labor to determine if you are required to pay worker's compensation and, if so, at what level.
- Unemployment Insurance and other Member Support Costs must also include adequate calculation details. You may not charge the cost of unemployment insurance taxes to the grant unless it is mandated by state law.



## Slide 13

Let's now consider a sample Member Support Costs section.

- The applicant included the required FICA for members but calculated it incorrectly. Although the math is correct, according to the application instructions, applicants must calculate FICA using a rate of 7.65% of total living allowances.
- In the Health Care section, the applicant seems to have estimated that a percentage of eligible members will decline the benefit. There is no requirement that you provide healthcare benefits to all full-time members, only that you offer it to all full-time members. When applicants budget for less than all full-time members, they generally base it on some historical information. The inclusion of the term "estimated" provides flexibility, should more or fewer members accept the benefit. It's important to note that, if you estimate that fewer than all members will accept the coverage, as a grantee, you must be prepared to cover the related costs and amend the budget as needed, if more members accept the coverage.
- This Health Care line also includes healthcare benefits for eight of the 10 half-time members. This might be allowable – but only if the half-time members are serving in a full-time capacity, such as a full-time summer program. If this was part of a submitted budget, it would likely result in a request for clarification that these are less than full-time members serving in a full-time capacity, otherwise, the cost is unallowable.
- Are there any required line items missing here? What about Worker's Compensation which the application instructions state is a required line item if the state requires worker's compensation coverage for AmeriCorps members? If the state does not require it, AmeriCorps requires grantees to obtain Occupational, Accidental, Death and Dismemberment coverage for members. One of these two costs must be included in the budget.

The second example includes the correct FICA calculation. Additionally, the health care line item was corrected to exclude the half-time members that apparently were not serving in a full-time capacity and the cost of the coverage is zeroed out, with the applicant noting that the benefit is provided off budget. Applicants frequently use this type of \$0 line item to provide additional information to confirm that the budget is compliant with the requirements of the NOFO and Application Instructions. And this example includes a line for the required member Worker's Compensation costs. And you see that the



applicant did not budget any match, since it is not required of Public Health AmeriCorps applicants.

#### Slide 14

Administrative Costs are general or centralized costs that support the project; they do not include specific project costs. They may be included in an organization's indirect cost rate agreement if one exists.

If you choose to include Administrative Costs in your budget, Public Health AmeriCorps applicants have two methods available for calculating them in Section III of the budget. (Please be aware that the "Corporation Fixed Percentage" described in the Application Instructions is not available to Public Health AmeriCorps applicants.)

- If applicants have a Federally Approved Indirect Cost Rate, they must use this method and the approved rate agreement constitutes documentation of the administrative costs. When using this rate, the AmeriCorps share is limited to 5% of the AmeriCorps funds. Be sure to specify the Cost Type (e.g., provisional, predetermined, fixed, or final) and supply the rate and base on which it is calculated (e.g., salaries, modified total direct costs). Follow the guidance in the Application Instructions to calculate maximum allowed. You do not need to budget the maximum allowed amount but, if you budget for less than the maximum, please note the percentage claimed in the budget narrative details. Applicants must also enter the details of their approved Negotiated Indirect Cost Rate Agreement in eGrants, using the guidance in the Application Instructions.
- Applicants that do not have a federally negotiated indirect cost rate and who receive less than \$35 million in direct federal funding, may use the De Minimis Rate of 10% of Modified Total Direct Costs. It is important to note that, if this option is elected, the organization must use it consistently across all the organization's federal awards.

Regardless of the method used, the AmeriCorps share of Administrative Costs is always limited to 5% of total AmeriCorps award funds expended. Guidance for calculating these costs is in the Application Instructions. Please pay close attention to the calculation guidance to avoid having to correct your calculations during the clarification process.

#### Slide 15



Now it's time to review some Indirect Cost line items.

This first example shows an applicant with a federally approved indirect cost rate. As requested in the application instructions, they provided the cost type, the basis on which it is calculated, approved rate, and rate claimed and detailed the cost calculation. In this example, they budgeted costs in the CNCS share – and we know this amount cannot exceed 5% of the budgeted CNCS share – and included the remaining amount as part of the Grantee Share. Again, Public Health AmeriCorps applicants are not required to provide matching resources in the budget, but they may want to show that they are budgeting some of the indirect costs as part of the Grantee Share. As a reminder, if you have a negotiated Indirect Cost Rate, you must enter the details of it in eGrants, using the guidance in the Application Instructions and make sure to calculate the costs using the detail of the rate.

The second example shows a similar calculation for an applicant using the De Minimis rate. In this example, the applicant entered the details in part B – under the Federally Approved Indirect Cost Rate option – and only budgeted the maximum 5% of the CNCS Share of Direct Costs using the calculation method outlined in the Application Instructions. This is perfectly allowable and likely to be what AmeriCorps sees on these Public Health AmeriCorps applications that do not require any match. Alternately, the applicant could have budgeted the remaining amount of the indirect costs in the Grantee Share, providing that the total didn't exceed the maximum amount allowed.

#### Slide 16

The last section of the budget narrative is the Source of Funds section. In it, you won't list budget sections or line item costs, rather you'll enter the source of any matching resources that you included in your proposed budget.

Under the Budget Section 3 tab, you will find a link to Enter Source of matching funds, as shown here. Once you click that link, a new screen will open for you to enter the source. Please be sure to note:

- The source of the match and whether the resource is secured or proposed,
- the amount of match,
- the classification (cash or in-kind), and



- the type of source (private, state/local, or federal), in the appropriate field.

I caution you to update this section, as well as the Indirect Costs section, after making any budget revisions, so they reflect all changes. The total in this section must equal the total amount of any budgeted match – exactly.

### Slide 17

When complete, the Source of Funds section might include content similar to this example. Note that this example only includes the source of match, not the specific sections or line items covered by the matching resources. And it provides the required details, noting whether the resources are secured or proposed, in-kind or cash donations, and provided by a private or government entity.

When completing this section, please take care as you use the dropdown menus. It's very easy to change the selected type or source. Incorrectly entering the source may result in additional clarifications.

As long as we're discussing matching resources, I want to remind you that, if a cost is unallowable as part of the AmeriCorps share, it is also unallowable as part of the grantee share (or your budgeted match). Again, if you're not sure if a cost is allowable or not, the Uniform Guidance is the best place to find the answer.

### Slide 18

Before I close, I want to offer a few pointers, beginning with guidance to check – and double-check – your work to eliminate erroneous information.

And, as I previously noted, I want to stress the benefits of involving your team – and someone outside of the team – in the budget development and review process.

And I strongly recommend using the tips on this visual and in the Budget Checklist, found in Attachment F of the Application Instructions, to make certain that you submit an accurate budget narrative that meets the AmeriCorps requirements.



Highlights of the Budget checklist include a check to make sure it meets AmeriCorps cost guidelines.

- Is the full-time living allowance within the minimum and maximum levels, between \$16,502 - \$32,004 per member?
- Is the Cost per MSY:  $\leq$  \$28,800? While eGrants will calculate this for you, you can get a head start on determining the Cost per MSY by dividing the total amount of AmeriCorps funds requested by the total number of MSYs requested. For example, if the application is for \$100,000 in AmeriCorps funds and 10 MSYs, then cost per MSY is \$10,000. (Note that the Cost per MSY does not include childcare or the cost of the Segal Education Award that a member may earn, since those costs are excluded from the budget.)
- Does the source of matching funds section provide all required information and align with any budgeted match – to the penny?

You will also want to check that the budget includes all required costs (such as member gear, National Service Criminal History Checks, member FICA, and full-time member healthcare), along with those costs that AmeriCorps strongly encourages applicants to include, such as AmeriCorps technical assistance events and new staff attendance at AmeriCorps Symposium pre-conference events.

As much as possible (due to eGrants character limits), the budget narrative should provide details – including the purpose and accurate calculations (in whole dollars) and exclude unallowable costs. I recommend that applicants use “\$0” line items to enter additional clarifications, if needed. And please have someone check all the calculations before you submit.

Finally – and most importantly, you should ensure that you aligned your budget narrative to the program goals in the application narrative. Including miscellaneous, contingency, or other undefined budget amounts may adversely impact your application status.

### Slide 19

In addition, before submitting your application, please make sure:

- Your organization has an active registration with the System for Award Management. If you are applying for a SAM registration for the first time, I recommend that you apply early, as it may take a while to activate the registration. AmeriCorps recommends that you apply for or renew your



registration at least 3 weeks prior to the application deadline, to allow time to resolve any issues that may arise. Please know that SAM is a free service. Organizations should never pay for a SAM registration.

- If you are a new or re-competing applicant, you submitted your Operational and Financial Management Survey (OFMS) as instructed on the funding opportunity page,
- You submitted your most recent single audit to the Federal Audit Clearinghouse and Form 990 to GuideStar, as applicable,
- You entered your current Federally Negotiated Indirect Cost Rate details, if you have one, in eGrants.

Details for all these actions are on the Public Health AmeriCorps funding opportunity page of [americorps.gov](http://americorps.gov).

#### Slide 20

Finally, AmeriCorps is aware that, on occasion, applicants experience challenges with the eGrants system. eGrants automatically performs a limited compliance check to validate the budget and it may result in a warning or error message. Some of these messages prevent you from submitting your application, so you should be aware of the differences and related actions. For instance:

- When you receive a warning, you can move forward, but the application or budget may not be compliant with the guidelines.
- On the other hand, an error message will not allow you to move forward until you correct the error. You must resolve all errors before you can submit your application.

Related to that, I understand that several applicants received a warning when proposing a budget with a \$28,800 cost per MSY. The warning you should receive states, "Please consult the cost per MSY requirements in the Notice of Funding Opportunity to ensure that the maximum amount has not been exceeded." As long as you are below the maximum, you can move forward with confidence.

If you experience a challenge other than a warning or error message, you should contact the AmeriCorps Hotline right away. The number is 800-942-2677 and a link to the help request form is at the bottom of most eGrants pages. It's wise to forward a copy of the service ticket to [americorpsgrants@cns.gov](mailto:americorpsgrants@cns.gov), so we have documentation of the problem.



### Slide 21

I want to draw your attention back to these bullets that I shared earlier. I encourage you to keep this checklist nearby as you develop your budget and frequently consult it as a budget development guide and quality assurance checklist. Many budgets require extensive revisions, in part because applicants do not follow the points outlined here. You will save yourself a great deal of follow up effort by checking your proposed budget against this checklist before submitting it to AmeriCorps.

### Slide 22

This concludes today's webinar.