

**FY 2025 RSVP**



**Competition**

AmeriCorps Seniors

# **Best Practices in Budget Development**

August 2024



# Agenda

- Important Reminders
- Best Practices in Budget Development
- Review How to Ask Questions





# Pre-Event Poll Questions

How confident do you feel in your current knowledge of budget development?

- 5 - Very Confident
- 4 - Confident
- 3 - Somewhat Confident
- 2 - Not Very Confident
- 1 - Not Confident at All

Have you utilized the training and technical assistance materials on [americorps.gov](https://americorps.gov)?

- Yes
- No
- Unsure



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# Important Reminders

*Things to Remember*



**AmeriCorps**  
Seniors



# Funding Opportunity Page



- Notice of Funding Opportunity and Appendices
- Grant Application Instructions
- Training and Technical Assistance Webinars
- FAQs and Other Resources for Applicants

For more information, visit the [Funding Opportunity Page](#).

## Fiscal Year (FY) 2025 AmeriCorps Seniors RSVP Opportunity

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### About RSVP

Established in 1971 and now one of the largest senior volunteer programs in the nation, AmeriCorps Seniors RSVP engages people ages 55 and older in a diverse range of volunteer activities. AmeriCorps Seniors RSVP volunteers tutor children, help prepare simple taxes, assist victims of natural disasters, provide nutrition/food support, facilitate opioid and substance abuse education workshops, and serve in their communities in many other ways. AmeriCorps Seniors RSVP volunteers choose how, where, and how often they want to serve, with commitments ranging from a few hours to a maximum of 40 hours per week. While serving, AmeriCorps Seniors RSVP volunteers improve their own lives by staying active and civically engaged. To read the statute that regulates the AmeriCorps Seniors RSVP program, view the [Uniform Guidance § CFR 800](#) and [RSVP Federal Regulations](#).

### Application Deadline

Applications are due by 6:00 p.m. Eastern Time on Thursday, September 18, 2024. Successful applicants will be issued awards by end of March 2025.



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# Important Dates



Applications are due no later than **Wednesday, September 18, 2024, by 5:00 PM ET**

Successful applicants will be issued awards by **March 2025**



Successful applicants will be notified by **January 2025**

*\* See Section D.4.c for the Late Application process*

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# Training and Technical Assistance



## Upcoming Training Opportunities

- [Using Narratives and Work Plans to Make Your Case](#): Aug 8, 2 PM ET

[Pre-submit a question](#) for the Q&A webinars.





# Key Contacts

Who to Contact and When



Question/Issue	Send an email to...
To receive a printed copy of the Notice, Grant Application Instructions, and Appendix B	<a href="mailto:RSVPCompetition@americorps.gov">RSVPCompetition@americorps.gov</a>
Late application request	<a href="mailto:LateApplications@americorps.gov">LateApplications@americorps.gov</a>
Request a federally negotiated indirect cost rate from AmeriCorps	<a href="mailto:IndirectCostRate@americorps.gov">IndirectCostRate@americorps.gov</a>
Submit the Operational and Financial Management Survey (OFMS)	<a href="#">Submit online</a> ; forms submitted by email will not be accepted
Submit Tribal organization eligibility documentation	<a href="mailto:AdditionalDocuments@americorps.gov">AdditionalDocuments@americorps.gov</a>
General questions about the competition or AmeriCorps Seniors	<a href="mailto:RSVPCompetition@americorps.gov">RSVPCompetition@americorps.gov</a>

*Please note: Incumbent grantees **should not** contact their portfolio manager for questions about the RSVP Competition.*





# Issues with eGrants

Call the AmeriCorps Hotline at 800-942-2677

- Make note of your ticket number
- If assistance is needed on an application within 10 days of the submission deadline, choose option #3

Submit a question to the support team via the [web form](#)

Hotline hours:

- Monday – Friday, 8:00 a.m. – 8:00 p.m. Eastern Time
- Closed on federal holidays

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# Best Practices in Budget Development for Fiscal Year 2025

## AmeriCorps Seniors RSVP Applicants



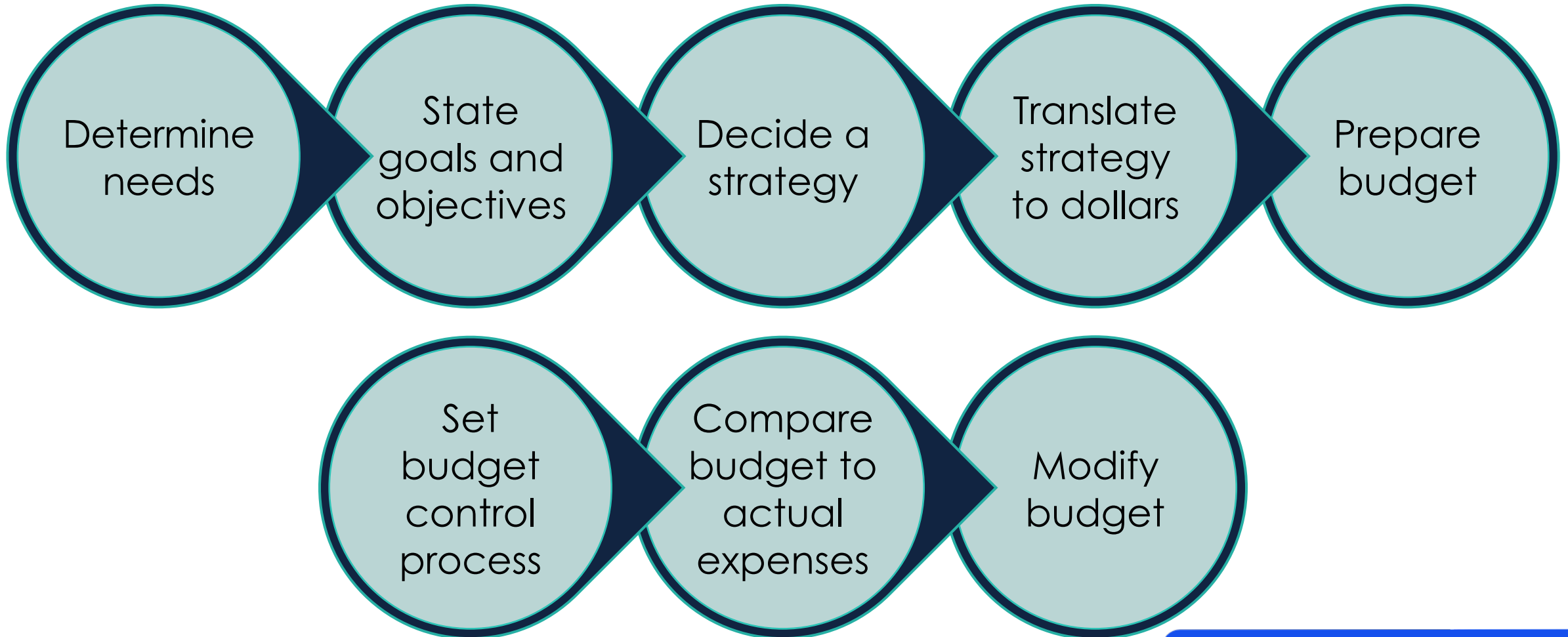
# Budget Functions

An approved budget is part of the grantee's legal obligation and:

- ◆ A financial guide
- ◆ Helpful to ensure compliance
- ◆ A tool for measuring progress and funds management

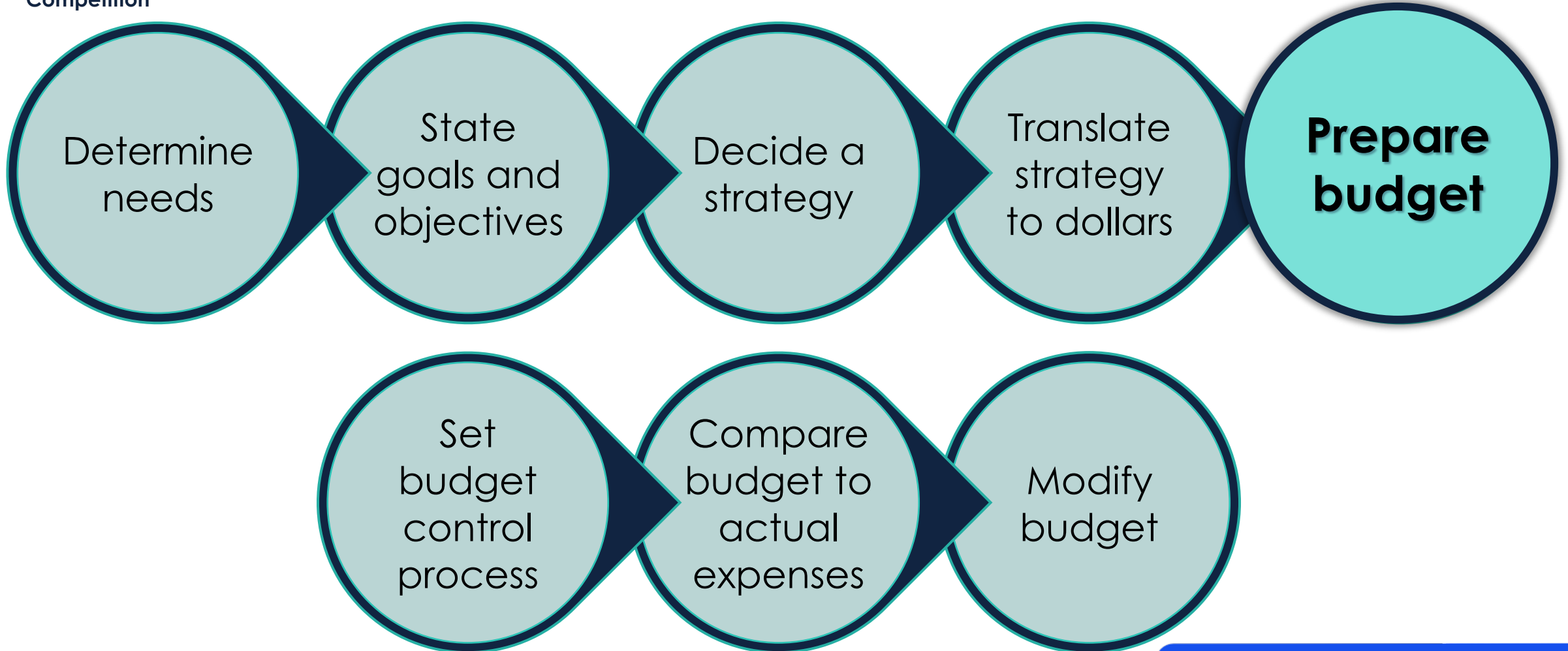


# Budget Management Process





# Budget Management Process







# Budget Basics

- ◆ Realistic
- ◆ Consistent
- ◆ Flexible
- ◆ Realistic scope
- ◆ Appropriate detail
- ◆ Competitive proposal
- ◆ Compliance
- ◆ Effective delivery



# Budget Narrative Development

- ◆ Follow instructions in Notice of Funding Opportunity
- ◆ Include allowable, reasonable, necessary, and allocable costs, as defined by 2 CFR 200

<https://ecfr.federalregister.gov>

- ◆ Estimate resources needed to achieve program goals
- ◆ Organize narrative to fit budget categories
- ◆ Provide adequate descriptions
- ◆ Check your math



# Unallowable Costs - Examples

- ◆ Lobbying
- ◆ Entertainment and alcohol
- ◆ Expenses not tied to program objectives
- ◆ Costs that constitute waste, fraud, and abuse
- ◆ Unreasonable from “prudent person” perspective
- ◆ Costs with no logical basis



# Minimum Match Requirement (Grantee Share)



Minimum grantee share increases gradually

	Year 1	Year 2	Year 3+
Minimum grantee share	10%	20%	30%

Example			
AmeriCorps grant funds	\$90,000	\$80,000	\$70,000
Grantee share	\$10,000	\$20,000	\$30,000
Total project costs	\$100,000	\$100,000	\$100,000



# Matching Resources

- ◆ Necessary
- ◆ Reasonable
- ◆ Allowable
- ◆ Allocable
- ◆ Authorized by Federal statute
- ◆ Compliant
- ◆ Documented

<https://americorps.gov/grantees-sponsors/manage-your-grant>



# Budget Structure



Separated by major categories and divided into AmeriCorps\* and Grantee shares

## I. Volunteer Support Expenses

Examples:

- ◆ Project staff personnel expenses and fringe benefits
- ◆ Project staff travel
- ◆ Equipment and supplies
- ◆ Contractual and consultant services
- ◆ Project staff Criminal History Checks
- ◆ Indirect costs

## II. Volunteer Expenses

Examples:

- ◆ Volunteer meals
- ◆ Volunteer uniforms
- ◆ Volunteer insurance
- ◆ Volunteer recognition
- ◆ Volunteer travel



# Section I. Volunteer Support Expenses

- A. Project Personnel Expenses
- B. Personnel Fringe Benefits
- C. Project Staff Travel
  - Local Travel
  - Long Distance Travel
- D. Equipment

**A. Project Personnel Expenses**

Position/Title -Qty -Annual Salary -% Time	CNCS Share	Grantee Share	Total Amount	Excess Amount
<b>Category Totals</b>				

**B. Personnel Fringe Benefits**

Item -Description	CNCS Share	Grantee Share	Total Amount	Excess Amount
FICA:				
Health Insurance:				
Retirement				
<b>Category Totals</b>				

**C. Project Staff Travel**

**Local Travel**

Purpose -Calculation	CNCS Share	Grantee Share	Total Amount	Excess Amount
<b>Category Totals</b>				

**Long Distance Travel**

Purpose -Destination -Other Travel -Trans. Amount -Meals/ Lodging	CNCS Share	Grantee Share	Total Amount	Excess Amount
<b>Category Totals</b>				

**D. Equipment**



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# Section I. Volunteer Support Expenses



- A. Project Personnel Expenses
- B. Personnel Fringe Benefits
- C. Project Staff Travel
  - Local Travel
  - Long Distance Travel
- D. Equipment
- E. Supplies
- F. Contractual and Consultant Services
- I. Other Volunteer Support Costs
- J. Indirect Costs

**A. Project Personnel Expenses**

Position/Title -Qty -Annual Salary -% Time	CNCS Share	Grantee Share	Total Amount	Excess Amount

**B. Personnel Fringe Benefits**

Item

FICA:

Health Insurance:

Retirement

**C. Project Staff Travel**

Local Travel

Purpose

Long Distance Travel

Purpose -Destination -Other

**D. Equipment**

**E. Supplies**

Item/ Purpose -Calculation	CNCS Share	Grantee Share	Total Amount	Excess Amount
Category Totals				

**F. Contractual and Consultant Services**

Purpose -Calculation	CNCS Share	Grantee Share	Total Amount	Excess Amount
Category Totals				

**I. Other Volunteer Support Costs**

Item	CNCS Share	Grantee Share	Total Amount	Excess Amount
Criminal Background Check:				
Category Totals				

**J. Indirect Costs**

Calculation -Rate Type -Rate -Rate Claimed -Cost Basis	CNCS Share	Grantee Share	Total Amount	Excess Amount
Category Totals				

# Section I.C. – Sample Entry



## Local Travel

Purpose -Calculation	CNCS Share	Grantee Share	Total Amount	Excess Amount
Staff travel (PD and PA) for site visits, project material distribution, recruitment, etc: Average 2,025 mi/month x \$.675/mi (per organizational policy)	2,025	0	2,025	0
Travel to CNCS-sponsored Convening	2,000	807	2,807	0
Subtotal	\$4,525	\$307	\$4,832	\$0

## Local Travel

Purpose -Calculation	CNCS Share	Grantee Share	Total Amount	Excess Amount
Staff travel (PD and PA) for site visits, project material distribution, recruitment, etc: Average 2,430 mi/month x \$.675/mi (per organizational policy)	2,430	0	2,430	0
Subtotal	\$2,430	\$0	\$2,430	\$0

## Long Distance Travel

Purpose -Destination -Other Travel -Trans. Amount -Meals/ Lodging	CNCS Share	Grantee Share	Total Amount	Excess Amount
PD and PC travel to CNCS-sponsored TTA (annual convening): per diem - \$79/day x 4 days (75% on first and last days); lodging - \$258 x 3 nights; round trip airfare - \$303; local transportation - \$50 (est) - Meals/Lodging 2,101 Trans 706 Other 0	2,000	807	2,807	0
Subtotal	\$2,500	\$307	\$2,807	\$0

# Section I.E. – Sample Entry



## E. Supplies

Item/ Purpose -Calculation	Total Amount	CNCS Share	Grantee Share	Excess Amount
Basic office supplies, copier paper, toner and ink cartridges, folders, etc:	1,000	0	1,000	0
Postage	1,000	0	1,000	0
Workstation equipment for PD	1,250	0	1,250	0
Program Supplies: program materials for service delivery (avg cost \$50/month per site)	7,500	0	7,500	0
Subtotal	\$10,750	\$0	\$10,750	\$0

## E. Supplies

Item/ Purpose -Calculation	Total Amount	CNCS Share	Grantee Share	Excess Amount
Basic office supplies, copier paper, toner and ink cartridges, folders, etc: Average \$85 per month (based on historical data for similar programs)	1,020	0	1,020	0
Postage: Estimated 125 pieces per month at .66 per piece	990	0	990	0
Laptop, mouse, keyboard, external monitor, printer for PD: estimated \$850	850	0	850	0
Program Supplies: program materials for service delivery (avg cost \$50/month per site x 13 sites)	7,800	0	7,800	0
Subtotal	\$10,660	\$0	\$10,660	\$0





# Section I.I. Indirect Costs

## 1. Federally Approved Indirect Cost Rate

- ◆ Must use this method if it exists
- ◆ Requires approved rate in budget
- ◆ Applicants enter rate details in eGrants

## 2. De Minimis Rate (15% of MTDC)

- ◆ Must use consistently across all federal awards
- ◆ Applicants enter rate details in eGrants



# Section I.I. – Sample Entry

## J. Indirect Costs

Calculation -Rate Type -Rate -Rate Claimed -Cost Basis	CNCS Share	Grantee Share	Total Amount	Excess Amount
<u>Final: Total Salaries and Fringe Benefits</u> : Final rate is <u>20.25%</u> of total salaries and fringe benefits (143,619); Amount claimed is <u>17.5% of salaries and fringe</u> , with a rate of 20.25 and a rate claimed of 17.5	8,797	16,337	25,134	0
<b>Category Totals</b>	8,797	16,337	25,134	0



# Section II. Volunteer Expenses

## A. Other Volunteer Costs

Item -Description	CNCS Share	Grantee Share	Total Amount	Excess Amount
Meals:				
Uniforms:				
Insurance:				
Recognition:				
Volunteer Travel:				
<b>Category Totals</b>				



# Source of Funds

The screenshot shows the AmeriCorps application interface. On the left is a navigation menu with options like 'Welcome Tracey', 'Start New Grant/Previous Grantee', 'Applicant Info', 'Application Info', 'Narratives', 'Work Plan', 'Documents', 'Budget Section 1', 'Budget Section 2', 'Funding/Demographics', 'Station Roster', 'Review', and 'Authorize and Submit'. The main content area is titled 'Start New Grant/Previous Grantee Grant Application' and includes sections for 'Budget Section I. Volunteer Support Expenses' and 'Project Personnel Expenses'. A dialog box titled 'Source of Matching Funds (Max. 1000 chars)' is open, with a text input field and 'cancel' and 'save & close' buttons. A red box highlights the dialog, and a red arrow points from the 'Enter Source of' label in the main application to the dialog's title.



# Source of Funds – Sample Entry

## Source of Funds

Section	Description
Section I. Volunteer Support Expenses	\$44,379 - <u>ORGANIZATION'S GENERAL OPERATING FUNDS</u> : secured, cash resources, private source \$1,350 - <u>VOLUNTEER IMPACT SOLUTIONS, LLC</u> : secured, in-kind resources, private source
Section II. Volunteer Expenses	\$400 - <u>HIGHER EDUCATION PARTNER (TBD)</u> : proposed, in-kind resources, state/local government source



# Budgeting Tips

- ◆ Meet RSVP budget regulations
  - Required expenses (e.g., AmeriCorps Seniors annual convening, Criminal History Checks)
  - Detailed Source of Funds equal to budgeted match
  - Adequate and accurate calculations and explanations
  - Allowable costs only
- ◆ Align with stated program goals



# Have you...

- ◆ Established or renewed your System for Award Management (SAM) registration at [www.sam.gov](http://www.sam.gov)?
- ◆ Submitted your Operational and Financial Management Survey (OFMS)?
- ◆ Submitted your single audit?
- ◆ Entered your Indirect Cost Rate details in eGrants?



# eGrants Messages

- ◆ Warning: Can submit but budget may not be compliant
- ◆ Error: Cannot proceed until data is edited

**eGrants technical assistance**

AmeriCorps Hotline: **800-942-2677**





# Quality Assurance Check

- ◆ Follow instructions in Notice of Funding Opportunity
- ◆ Include allowable, reasonable, necessary, and allocable costs, as defined by 2 CFR 200
- ◆ Estimate resources needed to achieve program goals
- ◆ Organize narrative to fit budget categories
- ◆ Provide adequate descriptions
- ◆ Check your math

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# Budget Development Office Hour



September 4, 2024, 2:00 pm Eastern Time

Questions?

Email [RSVPCompetition@americorps.gov](mailto:RSVPCompetition@americorps.gov)

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# Happy Budgeting!



# Post-Event Poll Questions

How confident do you feel in applying the skills and knowledge gained from the “Best Practices in Budget Development” training?

- 5- Very Confident
- 4- Confident
- 3- Somewhat Confident
- 2- Not Very Confident
- 1- Not Confident at All

Do you intend to apply for an AmeriCorps Seniors RSVP grant?

- Yes, this year (FY2025)
- Yes, but in the future
- Possibly
- Probably not
- No, definitely not



# AmeriCorps Seniors

FY 2025 AmeriCorps Seniors RSVP Competition

[RSVPCompetition@americorps.gov](mailto:RSVPCompetition@americorps.gov)

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**AmeriCorps  
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