USER GUIDE:
Earned Grant Amount Calculator for Full-time Fixed Price Grants

Corporation for
NATIONAL &
COMMUNITY
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Office of Grants Management

The Earned Fixed Amount Grant Calculator

The Earned Fixed Amount Grant Calculator <u>cannot be used</u> on grants where full time AmeriCorps Members have been converted to less than full-time service.

The *Earned Fixed Amount Grant Calculator* ("the tool") is a spreadsheet template used to determine the fixed amount grant that a program has earned based on enrolled AmeriCorps members' service status and hours. The tool establishes the earned grant amount as of the date a program's member roster was extracted from the Trust portal. The tool is can be used to identify the earned fixed amount grant for national direct programs without sub-grants, individual sub-grants awarded by national direct programs, and individual formula and competitive sub-grants awarded by State Commissions. The tool can also be used to calculate the earned grant amount for a Professional Corps program.

Earned grant amounts are assigned to each enrolled member and the sum of each member's earned grant amount equals the total earned grant amount. The earned grant amount attributed to an individual member is calculated as follows:

- For full time members in **Completed** status, the grantee is credited 100% of its per-member grant award using a calculation that ensures that the required 1700 hour minimum service level was reached (otherwise the award is pro-rated proportional to the hours served).
- For full time members in **Ended Service Early** status, the grantee is credited with a pro-rated share of the grant's fixed award amount based on the percentage of 1700 hours served by the individual member as of the date of testing.
- For full time members in **Active, Transfer IN, Reactivated or Suspended** status, the grantee is credited a pro-rated share of its per-member grant award based on the number of days elapsed since the member was first enrolled relative to the member's scheduled term of service.[1]
- For members serving in *less than full-time positions*, the tool identifies an approximate amount earned but flags a warning that the tool cannot be used to establish the correct earned grant amount.[2]

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[1] A final earned grant amount cannot be determined until all members are in *Completed* or *Ended Service Early* status. Rosters with Members in *Active* status will be estimates of earned grant amounts based on days served, not actual earned amounts based on hours served.

[2] For program year 2012 (2012-2013 service) some grantees were permitted to convert full-time members to less than full-time. The tool does not calculate an accurate earned grant amount based on service by less than full time members. A future edition of the tool will automatically make the appropriate calculation.

Edition 3.0, May 16, 2014

To use the tool:

1. **Open the appropriate template file:**

   Select and open the template you will use based on the maximum number of members enrolled in the program, including re-enrollments. Because larger spreadsheets run more slowly, templates are designed to calculate for programs with < 500, <1000, <3000, <5000, and 7500 or fewer members. The best template to use will be the one for testing the fewest number of members.

   Caution – always begin with a new template file. Do not re-use a file because you risk using an outdated version of the template. The only circumstance when it is reasonable to re-use a template is if you are making determinations for several grants in sequence and the risk of a new edition of the tool being published while the work is performed is low.

2. **Save the template file, renaming it to identify the grant being tested.**

   The renamed file is now the record you will use to establish the earned grant amount. Observe that the tool has three tabs:

   - Tab 1: Drawdown Calculations & Amounts
   - Tab 2: Analytical Tests
   - Tab 3: Copy & Paste Roster Report Here
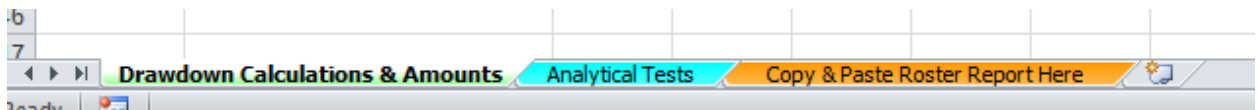
3. **Prepare for member roster data entry on the third tab "Copy & Paste Roster Report Here."**

   Click on the third tab, "Copy and Paste Roster Report Here." You should be viewing a blank worksheet tab. This is the worksheet where you will paste the Roster Report for the grant you are testing. Click on cell A1, make sure that cell A1 is highlighted.

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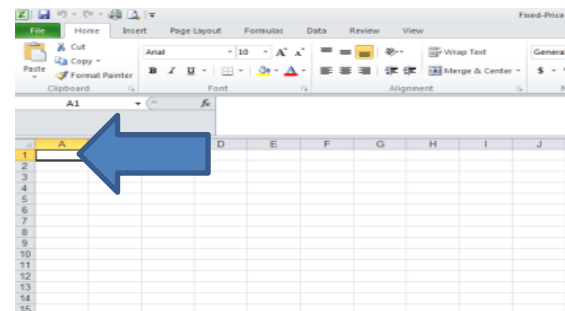
4. Go to the My AmeriCorps Portal to extract and save a Roster Report for the grant or subgrant being tested.

Extract a Roster Report in "Comma Separated Value" (CSV) format. *Hint – "Program Code = grant number; leave program year blank.*
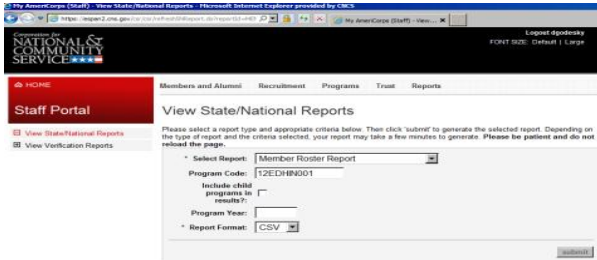

Save the Roster Report CSV file. The newly saved Member Roster Excel file will contain a single worksheet tab with data. The member roster data will either be for the single national direct grant or for a single state commission sub-awards being examined. In the saved member roster Excel file, click on the small block located between Column A and Row 1.
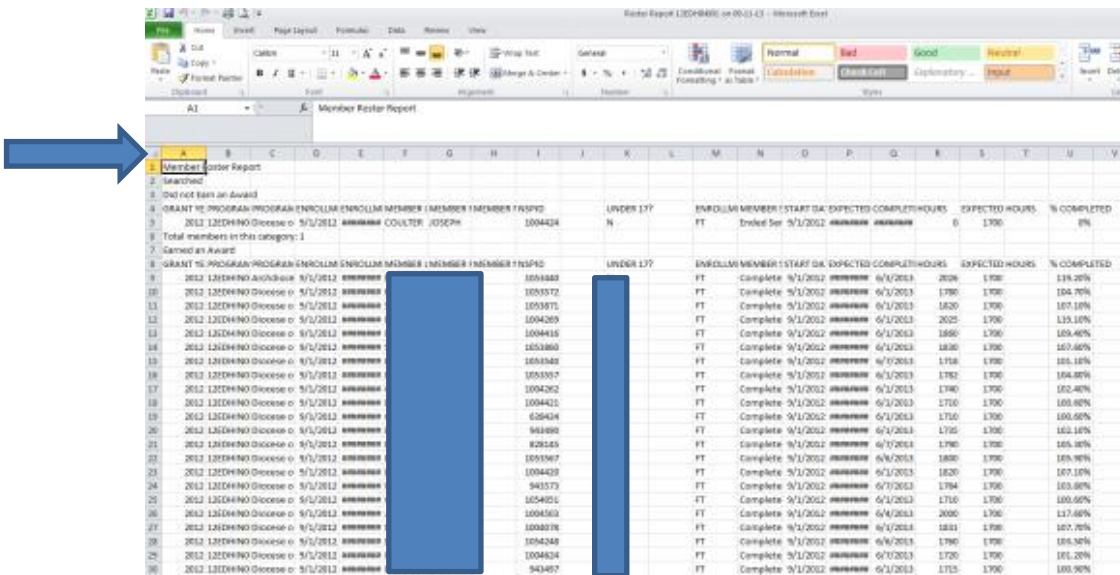
Note – some of the content above and throughout this guide is redacted because member rosters contain personally identifiable information (PII). Be sure that only individuals authorized to handle PII are accessing the Trust member roster.

Best Practice - save and resave your file after each step to ensure you do not lose your work.

All rows and all columns should now be highlighted. Right click "Copy" to copy the data.
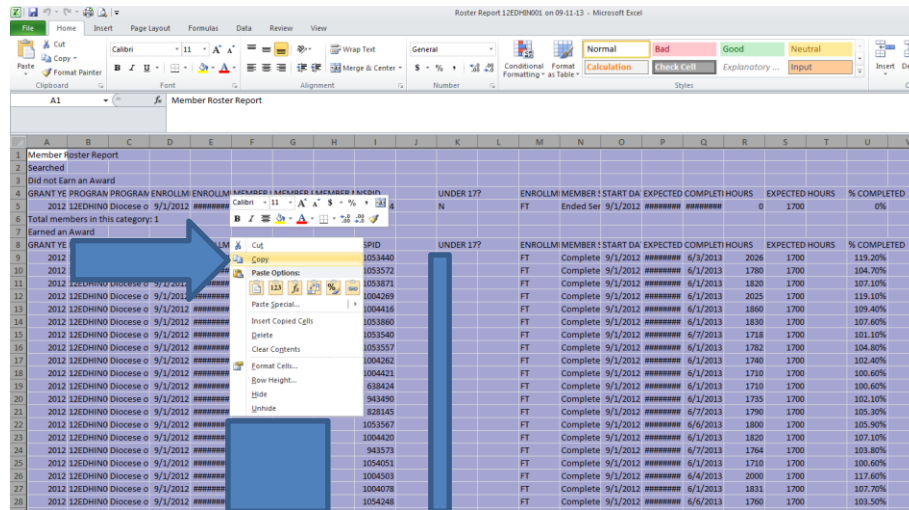
5. **Paste the Roster Report data into the tool at tab 3, cell A1.**

Return to the tool file which should still be at Tab 3, with cell A1 selected. Re-click in cell A1, then Right-click "Paste." You should see the worksheet at Tab 3 fill in with the same Roster Report data you saved in the Roster Report file.
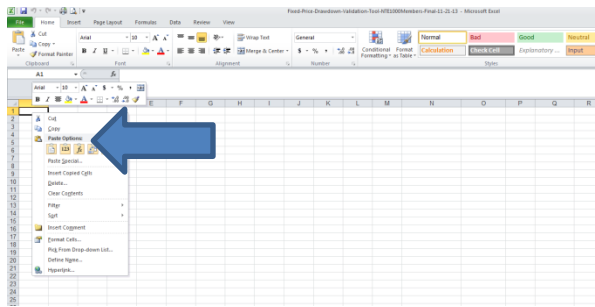

It is critical to verify that the member roster data has been correctly placed into Tab 3 of the tool. Do this by making sure that each member record row shows the Grant Year under Column A (e.g., data such as 2010, 2011, 2012, etc.). If Grant Year is not under column A, delete the content and try again.
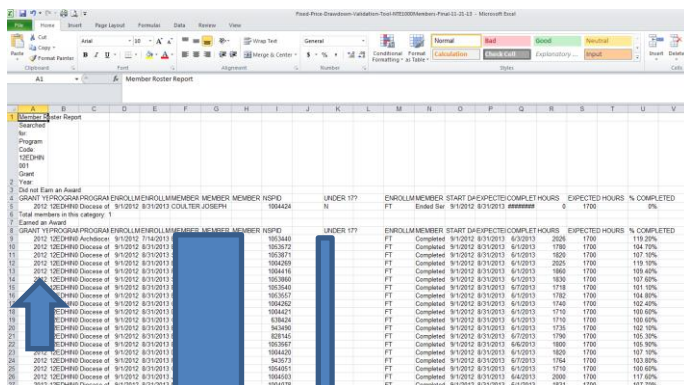
Do not be concerned that some cells fill with header data from the Roster Report or if some columns are not wide enough to display the data.

6. **On Tab 1, Enter Date of Calculation.**

   At the upper left corner is a cell to the right of "ENTER the AS-OF DATE" Enter the date that the Member roster was extracted. *Omitting this date will cause an error in the calculation of earned grant amounts.*
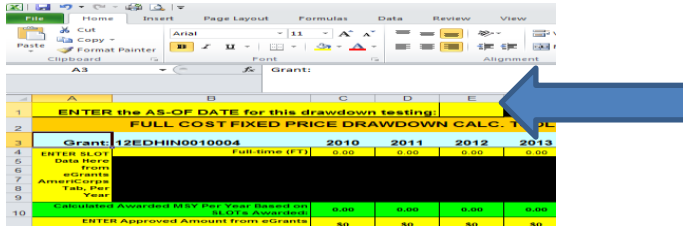
7. **Enter SLOT award data from the Notice of Grant Award (NGA)**

   For the award being examined, identify and enter the number of SLOTS awarded for each program year. On the tool, at Tab 1, go to the yellow shaded cells near the top left of the worksheet. This area is labeled, "Enter SLOT Data Here." Under the appropriate year column(s), enter the corresponding number of full-time SLOTS awarded for that year. In a green shaded row below your entries you will observe an estimated Awarded MSY per Year Based SLOTs figure increasing as you enter each SLOT number. Since you are testing full-time fixed price awards, the SLOT and MSY figures will be identical.
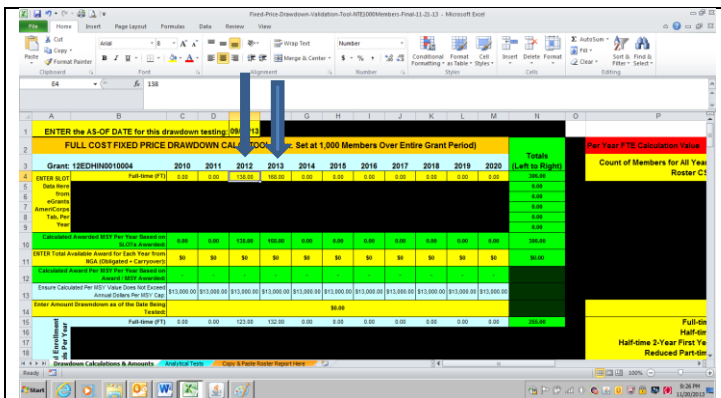
8. **Enter Award Amount per Year from NGA**

   In the row shaded yellow labeled, "Enter Approved Amount (Total Budgeted Amount) by Year," Enter the "Approved Amount" found on the Notice of Grant Award for each year the grant was funded. Page through all NGAs to ensure that you identify the Approved Amount for each funded grant year. *Per year, this amount includes any approved carryover*

amount. Omitting the carryover amount will result in a lower, incorrect potential earned maximum amount per member.

As you enter the Approved Amount for each year (typically for 3 years), the tool presents the "Estimated Award Per MSY Per Year" in a green shaded row directly below your entries. This amount must be equal or less than the allowable maximum per MSY for that year shown for that year (light blue row). If the estimated amount exceeds the allowable maximum for that year there is a potential problem with the financial parameters of the grant award. ***Investigate and resolve this discrepancy before proceeding***.

9. Enter the total amount drawn as of the date being tested

In the yellow row labeled, "Enter Amount Drawn down as of the Date Being Tested," enter the amount that drawn down for this grant from HHS PMS as of the date the roster was extracted.

10. Review analysis presented by the tool

At Tab 1, lower left, across from the row heading, "Result of Analysis" the tool will present the per year amounts as:

- Total MSY Value by Year
- Percent of Awarded MSY by Year that the grantee enrolled. Enrollment less than 90% will be flagged with red highlighting, but has no relevance to validating the earned grant amount
- The earned grant amount by year
- Total earned grant amount
- The difference between the earned and drawn amounts. Negative amounts (over-drawn) are shaded red and positive amounts (remainder to draw) are shaded green.

Caution –if the tool reflects over-enrollment in any year, compare the earned grant amount for each year to the awarded amount for each year. This comparison is to ensure that the tool is not estimating that more money was earned than was awarded for an individual program year.[3]

11. Warning – Members in *Active*, *Transfer IN*, *Reactivated*, and *Suspended* Status

The tool credits a grantee with an <u>*estimated*</u> earned grant amount for members in *Active, Transfer IN*, *Reactivated*, or *Suspended*, not the actual earned grant amount. This is because Members in these statuses do not have hours served recorded in the Trust. The estimate is

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[3] A rare but theoretically possible scenario might cause the tool to calculate an earned grant amount greater than the awarded total federal dollars for an individual program year. A future version of the tool will automatically protect against this unlikely circumstance.

based on days of service which is not a reliable measure of the final earned grant amount for these members.

At the bottom of tab 1 the tool presents counts and percentages of members in *Transfer IN*, *Reactivated*, or *Suspended* status. Counts greater than zero, and ratios of 10 percent or more, are highlighted red to alert the user that the earned grant amount includes estimated amounts for these members and thus the overall earned amount cannot be used for closeout.

Count of Members Other than Full Time:	2
Count of Members in Transfer IN status:	6
Count of Members in Reactivated status:	0
Count of Members in Suspended Status:	0
Percentage of Members in Transer In, Reactivated, or Suspended Status:	10.53%

12. Warning - Members in 3rd / 4th Terms of Service

Due to a Trust software flaw, in limited cases, members serving a third or fourth term of service might be identified on the roster as in "*unknown award status*" without hours served identified. This flaw appears to be limited to members who entered into 3rd/4th terms in the early stages of CNCS permitting third and fourth year enrollments. We believe the flaw is fixed and subsequently enrolled members in 3rd/4th terms have the hours show up.

If a program has members in the third or fourth term, and the members were enrolled before the flaw was fixed, the tool will not automatically assign an earned grant amount to those members. If there is proof that a member has served the hours and this technical glitch is not recording the member's hours on the roster, the user edits the "0" hours on roster tab 3 to be the actual hours served. This edit will increase the earned grant showing on tab 2 for that member, and automatically increate the total earned grant amount on tab 1.

13. Warning: If Less than Full Time Members Enrolled – DO NOT USE THIS TOOL

The analysis will also present information on how many, if any, members were less than full-time. At this time this tool cannot be used to establish an accurate earned grant amount if one or more members were in less than full time service:

Result of Drawdown Analysis:	Actual Total MSY VALUE BY YEAR:	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Percent of Awarded MSY by Year Enrolled by Program:	-	-	-	-	-	-	-	-	-	-	-	
	Amount Earned by Year:	$0	$0	$0	#VALUE!	$0	$0	$0	$0	$0	$0	$0	#VALUE!
	Maximum Amount Grantee May Draw on Grant To-Date:	#VALUE!											
	Remainder to Drawdown (+) or Overdrawn (-) and % off:	#VALUE!											#VALUE!
									Count of Members Other than Full Time:				30

If the "Count of Members Other than Full-time" is greater than zero, it is flagged in red. If less than full time member count is more than zero, the earned grant amount calculation is not valid. Examine the tables on Tab 1 to determine which years less-than-full-time members are enrolled for:

Grant: 13FXHAR0010001		2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
ENTER SLOT Data Here from eGrants AmeriCorps Tab, Per Year	Full-time (FT)				30.00							
Calculated Awarded MSY Per Year Based on SLOTs Awarded:		0.00	0.00	0.00	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
ENTER Approved Amount from eGrants Obligation Tab (Budgeted Amount) by Year:					$15,000							
Calculated Award Per MSY Per Year:		-	-	-	$500.00	-	-	-	-	-	-	-
Dollars Per MSY Cap per Year:		$13,000.00	$13,000.00	$13,000.00	$13,000.00	$13,000.00	$13,000.00	$13,000.00	$13,000.00	$13,000.00	$13,000.00	$13,000.00
Enter Amount Drawn as of the Date Being Tested:							$5,000.00					
Actual Enrollment Levels Per Year	Full-time (FT)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Half-time (HT)	0.00	0		30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Half-time 2-Year First Year (FY)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Reduced Part-time (RH)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Quarter-time (QT)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Minimum-time (MT)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Value of Actual Members Per Year	Full-time (FT)	0.00	0.00		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Half-time (HT and FY)	0.00	0.0		15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Half-time 2-Year First Year (2YR)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Less-than-full-time members can be individually identified by scrolling through the records found on tab 2, Analytical Tests where less than full time members are flagged, and on tab 3 where the roster was entered into the tool. At Tab 2, column 2, less than full time members are flagged with a count of "1" highlighted in red:

	A	B	C	D	E	F	G	H	I	J	K	L	M
5					Drawdown Check "As Of Date" =	12/03/13							
6													
7	FT Count	Other Than FT Count	Member Type by Months	Member Type by Days	Member Status	Completed or Ended Early (Y/N)?	Hours Served	% of 1700 Hrs. Served	No. Days Served	No. Months Served	No. Months Served Rounded	Member Last Name	Per-Member Earned Grant Award
8	0	1	13	382	Ended Service Early	Y	24	1.41%	42	1.40	2.00	HILL	$7.06
9	0	0	0	0	0	FALSE	0	0.00%	0	0.00	0.00	0.00	$0.00
10	0	0	0	0	0	FALSE	0	0.00%	0	0.00	0.00	0.00	$0.00
11	0	0	#VALUE!	#VALUE!	MEMBER STATUS	FALSE	HOURS	100.00%	#VALUE!	#VALUE!	#VALUE!	MEMBER LAST N	$0.00
12	0	1	12	364	Active	N	0	0.00%	91	3.03	4.00	ALLEN	$125.00
13	0	1	12	364	Active	N	0	0.00%	89	2.97	3.00	ATKINSON	$122.25
		1	12	364	Active	N	0	0.00%	91	3.03	4.00	AULT	$125.00
		1	12	364	Active	N	0	0.00%	89	2.97	3.00	BELL	$122.25
16	0	1	12	364	Active	N	0	0.00%	90	3.00	3.00	BIVENS	$123.63
17	0	1	12	364	Active	N	0	0.00%	91	3.03	4.00	GARCIA	$125.00
18	0	1	12	364	Active	N	0	0.00%	70	2.33	3.00	GAVIN	$96.15

At Tab 3 there is a member enrollment code for each individual:

Did not Earn an Award													
GRANT YE	PROGRAM	PROGRAM	ENROLLM	ENROLLM	MEMBER	MEMBER	MEMBER	NSPID	UNDER 17?	ENROLLM	MEMBER	START DA	EXPECTE	COMPLET	HOURS	EXPECTED HOURS
2013	13FXHAR	Arkansas	9/1/2013	8/31/2014	HILL	REBECCA	558860	N	HT	Ended Ser	9/25/2013	########	11/6/2013	24	900
Total members in this category: 1														
Earning an Award														
GRANT YE	PROGRAM	PROGRAM	ENROLLM	ENROLLM	MEMBER	MEMBER	MEMBER	NSPID	UNDER 17?	ENROLLM	MEMBER	START DA	EXPECTE	COMPLET	HOURS	EXPECTED HOURS
2013	13FXHAR	Arkansas	9/1/2013	8/31/2014			1128412		HT	Active	9/3/2013	9/2/2014		900
2013	13FXHAR	Arkansas	9/1/2013	8/31/2014			972591		HT	Active	9/5/2013	9/4/2014		900
2013	13FXHAR	Arkansas	9/1/2013	8/31/2014			858460		HT	Active	9/3/2013	9/2/2014		900
2013	13FXHAR	Arkansas	9/1/2013	8/31/2014			1125464		HT	Active	9/5/2013	9/4/2014		900
2013	13FXHAR	Arkansas	9/1/2013	8/31/2014			867778		HT	Active	9/4/2013	9/3/2014		900
2013	13FXHAR	Arkansas	9/1/2013	8/31/2014			598439			Active	9/3/2013	9/2/2014		900
2013	13FXHAR	Arkansas	9/1/2013	8/31/2014			96037			Active	9/24/2013	9/23/2014		900
2013	13FXHAR	Arkansas	9/1/2013	8/31/2014			859101			Active	9/3/2013	9/2/2014		900
2013	13FXHAR	Arkansas	9/1/2013	8/31/2014			973153			Active	9/3/2013	9/2/2014		900
2013	13FXHAR	Arkansas	9/1/2013	8/31/2014			1125491			Active	9/3/2013	9/2/2014		900

If less-than-full-time members have been enrolled work with your CNCS Grants Officer to establish the accurate earned grant amount.

14. User Notes

At the bottom of Tab 1, space is provided to enter user notes on how the calculation was performed. There are no restrictions on what is entered into this field.

Enter User Notes Below:

15. Miscellaneous

- Unless noted otherwise, all calculations and results are unrounded even when a limited number of decimal places are shown on the spreadsheets. The calculated earned grant award per member and overall earned grant amount are rounded to the nearest cent, rounding up at 0.005 and higher.

- User feedback is welcome. Please send user questions and feedback to:

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