

WEBVTT

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00:00:06.089 --> 00:00:19.200

Tracey Seabolt: Thank you Jeff and thanks to all of you for spending the next hour of your day with me to consider the best ways to develop a compliant and competitive America for Indian tribes budget.

2

00:00:21.900 --> 00:00:25.110

Tracey Seabolt: Sorry, I have a little bit of feedback i'm trying to get rid of here.

3

00:00:27.300 --> 00:00:35.070

Tracey Seabolt: I encourage your engagement in this webinar as you heard you can use the Q amp a panel to ask questions at any time.

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00:00:35.400 --> 00:00:49.950

Tracey Seabolt: And my colleague Monet porter is helping me to monitor monitor the Q amp a panel and she'll remind me to pause throughout the presentation to read and answer your questions, so please be patient if we don't get to your questions immediately.

5

00:00:51.180 --> 00:01:01.320

Tracey Seabolt: We are working our way through them and sometimes we may pause just because we know that that content is coming up a little later in the in the conversation.

6

00:01:02.730 --> 00:01:19.080

Tracey Seabolt: Before you do ask a question, we also ask you to keep in mind that we cannot respond to specific questions about the content of your proposed budget web rather we will provide clarifications to help you submit a compliant budget.

7

00:01:20.250 --> 00:01:29.130

Tracey Seabolt: You should use the nofollow and the application instructions to determine the most appropriate budget that meets your stated program needs.

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00:01:31.140 --> 00:01:47.850

Tracey Seabolt: Additionally, we will check your understanding of various concepts, by asking you questions throughout this session, so please respond to these questions in the chat box and let's just test that out if you're ready to get started, give me a yes in the chat box, please.

9

00:01:52.890 --> 00:02:00.480

Tracey Seabolt: Oh no one's ready to get started, there we go that's what I wanted to see great i'm certainly ready to get started.

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00:02:01.320 --> 00:02:10.200

Tracey Seabolt: Before I move into the specific content of our session know that we are going to reference a sample budget narrative throughout this session.

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00:02:10.590 --> 00:02:18.300

Tracey Seabolt: And we'll also post that on the americorps state and national brands fyi 2021 funding page after this webinar.

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00:02:18.720 --> 00:02:29.130

Tracey Seabolt: I think sandy just dropped it into the chat box, if you have a newer version of zoom you should be able to access it and follow, along with it and, if not.

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00:02:29.550 --> 00:02:37.380

Tracey Seabolt: As Jeff said we're going to post the recording of this presentation on the funding page and we'll post that sample budget right along with it.

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00:02:38.760 --> 00:02:51.360

Tracey Seabolt: And I also want to thank you for responding to the various poll questions just knowing who is on this call, and what your needs are really helps us to focus on the points that are most relevant to you.

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00:02:51.960 --> 00:03:02.520

Tracey Seabolt: So we appreciate that I do want to point out, I see that there's at least one fixed amount award that that someone's working on.

16

00:03:02.910 --> 00:03:12.750

Tracey Seabolt: And so I want you to I want to make sure you're aware that the majority of this discussion is going to focus on budgets that are submitted as part of a cost reimbursement application.

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00:03:13.530 --> 00:03:21.570

Tracey Seabolt: And although fixed fixed award recipients aren't subject to the same budget and cost principal requirements as the cost reimbursement awards are.

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00:03:21.900 --> 00:03:33.300

Tracey Seabolt: This conversation is going to help all applicants both cost reimbursement and fixed award applicants improve their fiscal management responsibilities so even if you're planning to submit a fixed of.

19

00:03:33.840 --> 00:03:47.010

Tracey Seabolt: Ward application, you may find the information helpful you're welcome to remain connected, although if you decide that it's better for you to drop off, I certainly understand that as well.

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00:03:49.080 --> 00:03:57.150

Tracey Seabolt: Either way, regardless of what type of application you're submitting my goal for today is really to help you the americorps tribal.

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00:03:57.420 --> 00:04:07.980

Tracey Seabolt: grant applicant acquire the knowledge and skills that you need to understand the function of and to develop and effect effective americorps Budget and Budget narrative.

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00:04:08.280 --> 00:04:18.360

Tracey Seabolt: and your submission of a complete and high quality budget will really help to demonstrate that you have the fiscal capacity to manage an americorps Program.

23

00:04:19.470 --> 00:04:28.170

Tracey Seabolt: During this session we will holistically review the components of an americorps budget, which includes the americorps resources and your matching resources.

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00:04:28.440 --> 00:04:33.810

Tracey Seabolt: And at the end of the webinar you should understand how to determine if those costs are allowable.

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00:04:34.050 --> 00:04:42.960

Tracey Seabolt: Reasonable necessary and applicable, as determined by two CFR 200 the office of management and budgets uniform administrative requirements.

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00:04:43.230 --> 00:05:00.510

Tracey Seabolt: Cost principles and audit requirements for federal awards frequently referred to as a uniform guidance and using this information and the tips and best practices that we share here today, you should be prepared to submit a compliant and competitive budget.

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00:05:04.380 --> 00:05:16.260

Tracey Seabolt: So, because the budget and the budget narrative becomes part of the grant recipients contract with americorps we want, and we expect our applicants to present a strong and accurate document.

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00:05:16.650 --> 00:05:24.720

Tracey Seabolt: 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.

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00:05:25.170 --> 00:05:42.030

Tracey Seabolt: In addition to helping americorps monitor the grant and financial compliance, it can serve as a tool for both americorps and award recipients to measure progress toward the match requirements and monitor budgeted expenses to actual expenses, as part of your budget management process.

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00:05:43.260 --> 00:05:50.130

Tracey Seabolt: Before we dive into the details of budget development I do want to point out the budget development is just one component.

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00:05:50.490 --> 00:05:56.490

Tracey Seabolt: of an effective budget management process so let's just take a moment to look at the full process.

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00:05:57.240 --> 00:06:03.000

Tracey Seabolt: As you started to work on your americorps application, you may have asked yourself how do I design a strong budget.

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00:06:03.870 --> 00:06:14.970

Tracey Seabolt: You know just real quickly there's no right or wrong answer, but if you did that just throw it in the chat tell me that you did, whether it was to yourself, or to someone else on your team.

34

00:06:16.170 --> 00:06:21.480

Tracey Seabolt: You know, think about that who else could help you to develop your budget.

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00:06:22.710 --> 00:06:26.340

Tracey Seabolt: You know and and how would you engage them.

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00:06:27.540 --> 00:06:30.840

Tracey Seabolt: So, think about that as we go through this next piece.

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00:06:31.890 --> 00:06:37.890

Tracey Seabolt: And again whether you started the process with that question or not, as part of the pre award project development process.

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00:06:38.310 --> 00:06:48.960

Tracey Seabolt: You probably determine the needs, you want to address with americorps resources you set up program and project goals and objectives and you decided on a strategy to accomplish those goals.

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00:06:49.320 --> 00:06:58.350

Tracey Seabolt: And then to develop the budget applicants must translate the strategy into dollars and prepare a budget that's aligned with the stated Program.

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00:06:58.680 --> 00:07:06.930

Tracey Seabolt: goals and objectives and then posterboard grantees will continue to manage their budgets effectively by establishing a budget control process.

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00:07:07.230 --> 00:07:25.800

Tracey Seabolt: Monitoring expenses that is regularly comparing your budget to actual expenses to check for over and understanding and then modifying the budget as necessary with approval from America poor when required so today's conversation is going to focus on that budget preparation process.

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00:07:27.060 --> 00:07:37.890

Tracey Seabolt: let's start by talking 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.

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00:07:38.310 --> 00:07:52.350

Tracey Seabolt: And it should be consistent and aligned with the program's goals and objectives, and it should be flexible programs financial and operating circumstances change and we know that they have budget must adapt to those changing circumstances.

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00:07:53.040 --> 00:07:58.680

Tracey Seabolt: And for now we'll focus on the realistic and consistent features as they relate to budget design.

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00:07:59.880 --> 00:08:07.860

Tracey Seabolt: A few minutes ago I outline the steps that your team may have taken as part of the budget development process and I asked you who you could engage.

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00:08:08.760 --> 00:08:15.120

Tracey Seabolt: We really encourage applicants to approach budget design as a team activity engaging various.

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00:08:16.020 --> 00:08:22.590

Tracey Seabolt: various departments, based on the individual expertise and I know Patricia had noted in the chat.

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00:08:22.950 --> 00:08:28.680

Tracey Seabolt: That time was a huge issue for her and her biggest concern about putting together this budget.

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00:08:29.040 --> 00:08:37.230

Tracey Seabolt: And I think engaging these other teams can help you to figure out, you know what is it that I need to do, how can I put my budget together.

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00:08:37.470 --> 00:08:46.500

Tracey Seabolt: So, think about what departments or individuals in your organization, you could engage on your budget design team and what expertise, they provide.

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00:08:47.100 --> 00:08:55.560

Tracey Seabolt: And we put that in the chat if you've got some ideas i'd love to see you enter in the chat who you could involve.

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00:08:56.190 --> 00:09:09.900

Tracey Seabolt: So just take a moment and give us, you know some departments some individuals that you know their title, they could support you, through this process and what specific expertise, they might bring to the process.

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00:09:11.160 --> 00:09:29.130

Tracey Seabolt: Accounting department fiscal support staff absolutely your Accounting Office will have historical spending rates and they can help you to review the budget for clarity, you know they certainly have that kind of information that they can they can help you with other ideas.

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00:09:32.370 --> 00:09:38.490

Tracey Seabolt: Your human resources department, they should have the salary, the French the criminal history check costs.

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00:09:39.510 --> 00:09:51.600

Tracey Seabolt: Finance director absolutely your finance director again if you can always go to those folks to be that that extra set of eyes to double check to make sure that this is a accurate document.

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00:09:52.050 --> 00:10:00.720

Tracey Seabolt: Compliance department or a grants office yeah absolutely they should be able to look to see if your document is compliant with the requirements.

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00:10:01.800 --> 00:10:08.520

Tracey Seabolt: You know your program team is going to have the cost for training, your Members delivering services so so I just.

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00:10:08.970 --> 00:10:23.910

Tracey Seabolt: Caution you and encourage you, rather, to to think beyond just yourself and not take this on solely but really think about the other resources that are available to you, we don't want you to undertake this process in a vacuum.

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00:10:25.410 --> 00:10:32.970

Tracey Seabolt: So go out and involve as many others, as you need to including your government leadership, you know you want to get the most realistic data.

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00:10:33.360 --> 00:10:38.520

Tracey Seabolt: You want to make sure this aligns with the programmatic goals and objectives and you want this to be accurate.

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00:10:38.910 --> 00:10:46.320

Tracey Seabolt: Our team always laughs about the mom test and having mom look at your budget to see if there's you know some math is right.

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00:10:46.920 --> 00:10:51.600

Tracey Seabolt: But having somebody else look at it just takes a little bit of the pressure off of you.

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00:10:52.230 --> 00:11:05.610

Tracey Seabolt: But we also recommend using the historical information as much as possible again your accounting department should have that information and then you just need to adjust the data as needed so that it's time layer

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00:11:06.360 --> 00:11:12.900

Tracey Seabolt: And you know that's when in your budget description and then you'll note that this is based on historical information.

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00:11:13.980 --> 00:11:30.360

Tracey Seabolt: When finished your strong budget design it really does provide a framework for effective budget management, it ensures a realistic scope appropriate detail a competitive proposal compliance and effective delivery, that is, it serves as a guide for program implementation.

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00:11:31.380 --> 00:11:45.600

Tracey Seabolt: And in order to create a budget that is strong, accurate and requires minimal clarification, again, I encourage you to take your time, I know that that's a concern but take your time and engage others in data collection and quality review.

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00:11:47.430 --> 00:11:55.140

Tracey Seabolt: But as I previously noted, one of the objectives for today's session is to provide you with tips and tools for creating a competitive budget narrative.

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00:11:55.470 --> 00:12:08.250

Tracey Seabolt: And the first tip is to read and follow the instructions in the nofollow and the application instructions which includes the minimum and maximum cost levels and required line items, both of which we'll discuss a little later in the presentation.

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00:12:09.300 --> 00:12:23.610

Tracey Seabolt: Within the application instructions you'll find detailed budget instructions for cost reimbursement grants and attachments the nc and then, if you're a fixed amount grant applicant you'll find those detailed instructions in a attachments Danny.

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00:12:24.660 --> 00:12:31.980

Tracey Seabolt: The strongest and most compliant the budget narratives adhere to guidelines in these documents which saves us all time and effort later.

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00:12:32.610 --> 00:12:49.650

Tracey Seabolt: I also encourage you to become familiar with the uniform guidance and only include those costs that are allowable reasonable necessary and analytical and you can find the uniform guidance online at a cfr.gov under Title to grants and agreements.

72

00:12:50.790 --> 00:13:02.340

Tracey Seabolt: After you and your team estimate the financial resources, you need to achieve the state of program goes to organize them into the narratives budget categories again following the guidance in the Novo.

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00:13:03.180 --> 00:13:11.700

Tracey Seabolt: Excuse me, and the application instructions and, as you develop the narrative remember to provide adequate descriptions and clear calculations.

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00:13:12.330 --> 00:13:19.560

Tracey Seabolt: He grants will automatically populate a budget summary and budget narrative report that should be able to serve as a standalone document.

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00:13:19.890 --> 00:13:34.500

Tracey Seabolt: Without a need to reference the application narrative for explanation for this reason I always recommend having someone outside of the budget development team review that document for holes and inaccuracy so and again that goes back to our mom test.

76

00:13:35.640 --> 00:13:46.650

Tracey Seabolt: The uniform guidance, as well as the Novo and the application instructions specify cost considered allowable such as lobbying and entertainment and alcoholic beverages and fundraising.

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00:13:47.100 --> 00:13:54.150

Tracey Seabolt: americorps strongly encourages applicants to review that uniform guidance to avoid, including on allowable costs in your proposed budget.

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00:13:55.050 --> 00:13:59.850

Tracey Seabolt: Other unelectable costs include those that are not necessary to meet the program objectives.

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00:14:00.150 --> 00:14:10.860

Tracey Seabolt: For example, budgeting americorps symposium travel expenses for six staff, when only four steps are on the americorps budget is not allowable and it could be considered waste, fraud or abuse.

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00:14:11.400 --> 00:14:26.730

Tracey Seabolt: Another example is budgeting let's say \$5,000 for landscaping equipment and materials for literacy program these are costs that would be considered allowable from a prudent person perspective or have no logical basis for inclusion in the budget.

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00:14:29.190 --> 00:14:38.310

Tracey Seabolt: it's important to remember that if a cost is on the allowable as part of the americorps share, it is also an allowable as part of the grantee share or you're required match.

82

00:14:39.030 --> 00:14:50.580

Tracey Seabolt: As shown on this visual the grantee share of total cost increases over time first time successful applicants are required to match at 24% for the first three year funding period.

83

00:14:51.240 --> 00:15:01.260

Tracey Seabolt: beginning in your for the match requirement gradually increases each year to 50% or a minimum dollar for dollar match by your 10.

84

00:15:01.860 --> 00:15:10.560

Tracey Seabolt: cashing in kind contributions are acceptable match when they are necessary and reasonable for proper and efficient accomplishment of project or program objectives.

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00:15:11.010 --> 00:15:22.440

Tracey Seabolt: When they are allowable under the uniform guidance and application instructions when they are not included in the approved or

when they are included in the approved budget and allowable under program guidelines.

86

00:15:22.830 --> 00:15:28.770

Tracey Seabolt: When they are not paid by the Federal Government under another award except when authorized by federal statute.

87

00:15:29.790 --> 00:15:37.290

Tracey Seabolt: When they are compliant with the terms of conditions of the award and uniform guidance and when they are verifiable from the organization's records.

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00:15:39.390 --> 00:15:48.270

Tracey Seabolt: The matching resources must be treated the same as americorps share and consistent treatment includes complete and accurate documentation.

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00:15:48.930 --> 00:15:58.920

Tracey Seabolt: A frequently heard phrase in the world of grants management is if it didn't have if it isn't documented it didn't happen, so please do make sure to document all of your expenses.

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00:15:59.850 --> 00:16:18.480

Tracey Seabolt: I want to go back to the point that matching resources are allowable when they are not paid for by the Federal Government under another award except when authorized by federal stretch statute public law 93 638 allows tribes to use federal funding for other awards.

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00:16:20.460 --> 00:16:30.390

Tracey Seabolt: i'm sorry to meet caching sorry to meet cashing in kind of requirements for grants from another federal agency so entities that are applying.

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00:16:30.780 --> 00:16:43.200

Tracey Seabolt: on behalf of a federally recognized tribes must obtain approval from the other agency to use these funds as match and know that you need to report these to America or on your federal financial report.

93

00:16:43.950 --> 00:16:52.470

Tracey Seabolt: also keep in mind that you may not use other americorps resources such as vista or America or senior resources is match for another americorps award.

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00:16:54.000 --> 00:17:03.780

Tracey Seabolt: Because the applicants must demonstrate an adequate plan for non americorps support they're required to include the source of matching the budget narrative entering a description of the source.

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00:17:04.140 --> 00:17:13.080

Tracey Seabolt: Along with the amount of cash or in kind classification, the type of match source, that is, whether it's state or local government federal funds or private donations.

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00:17:13.410 --> 00:17:30.240

Tracey Seabolt: And confirmation of whether the sources of match are secured or proposed you do not need to secure 100% of your match prior to submitting the application, but anticipated match must be included and the total in this section must equal, the amount of match shown on the budget.

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00:17:31.440 --> 00:17:37.140

Tracey Seabolt: Also, please note that he grants rounds, the budgeted manager of mount up to the nearest percentage so.

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00:17:37.500 --> 00:17:55.530

Tracey Seabolt: If you have a budget with 49.7% match that's actually going to appear in a grants as a 50% match, even though it's not \$1 for dollar match, so I always recommend it your calculate your percentage outside of he grants to make sure that you're meeting or exceeding the required percentage.

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00:17:56.640 --> 00:18:07.350

Tracey Seabolt: Alright i'm going to take a break and pause and see if we have any questions that have come in, yet Monet did we have any questions in that Q amp a panel yet.

100

00:18:08.820 --> 00:18:14.460

Monae Porter: So we did not have any questions as of now, but I do have a question for you.

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00:18:15.000 --> 00:18:15.750

Tracey Seabolt: Okay sure.

102

00:18:17.010 --> 00:18:24.600

Monae Porter: So my question is must grantees meet the exact match each year, or is the mass cumulative over the three year award.

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00:18:25.650 --> 00:18:36.780

Tracey Seabolt: Great question that the regulatory match is a cumulative amount So although americorps monitors those contributions through the semi annual FF our submissions.

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00:18:37.140 --> 00:18:42.480

Tracey Seabolt: You grantees are not required to meet the cumulative match contributions until close out.

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00:18:43.170 --> 00:18:53.700

Tracey Seabolt: there's flexibility to meet the requirements over the grant life so obviously the first three years when it's 24% and 24%.

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00:18:54.030 --> 00:19:04.260

Tracey Seabolt: You know that cumulative amount is going to be 23 but then after that it's going to be based on the annual award and whatever the matches for that annual award.

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00:19:04.530 --> 00:19:15.600

Tracey Seabolt: The total amount of the required match that cumulative amount is what grantees are required to meet at close out great question thanks renee okay.

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00:19:17.340 --> 00:19:38.010

Monae Porter: And so I know that americorps issued a match waiver, in response to the cove it so if a currency if a grantee is currently operating within a match waiver is it Okay, for them to submit the fly application without match resources i'm assuming that the waiver will continue into fy 2021.

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00:19:38.670 --> 00:19:46.980

Tracey Seabolt: yeah actually the tribal no photo references the match waiver that was issued for state and national grantees back in December.

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00:19:47.460 --> 00:20:00.930

Tracey Seabolt: So, as a result of this waiver applicants may submit budgets with less than the full required match included, however, I really caution you to think about what you're submitting in that budget.

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00:20:01.830 --> 00:20:19.890

Tracey Seabolt: We know that these programs cannot operate on the cash resources received by americorps so think about what else you need to support that program and take every possible effort to show how you will support your program beyond the americorps resources.

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00:20:22.650 --> 00:20:29.940

Tracey Seabolt: Great question and before we move on, I do want to note that, while there are no match requirements for fixed amount of grants.

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00:20:30.240 --> 00:20:43.440

Tracey Seabolt: Applicants are required to enter the source of matching funds so if you're applying for a fixed amount award please make sure you complete this section to show that you're covering the program costs beyond those provided by americorps.

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00:20:45.780 --> 00:20:53.640

Tracey Seabolt: As you enter data into your budget narrative, you will notice that includes both the americorps and grantees share project costs additionally.

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00:20:54.000 --> 00:21:03.570

Tracey Seabolt: The budget classifies costs into direct and indirect or administrative costs categories direct costs include program operating costs and Member costs while but.

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00:21:04.020 --> 00:21:11.850

Tracey Seabolt: watch the budget breaks into major categories that may include specific line items such as those shown here on the slide.

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00:21:12.240 --> 00:21:18.510

Tracey Seabolt: These costs are applicable to the grant that is their associated with specific grant related activities.

118

00:21:18.990 --> 00:21:27.180

Tracey Seabolt: and general or centralized organizational expenses spread across the entire organization or indirect or administrative costs.

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00:21:27.600 --> 00:21:40.200

Tracey Seabolt: And as you the americorps applicant develop your budget management systems and, specifically, the budget control process you'll want to establish clear policies and procedures for tracking and documenting these expenses.

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00:21:41.940 --> 00:21:50.970

Tracey Seabolt: So now, but it takes some time to review the specific budget categories and related guidance in the americorps application instructions and we'll start with section one.

121

00:21:51.390 --> 00:21:56.610

Tracey Seabolt: Which is the program operating costs, so that the cost of doing business essentially.

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00:21:57.510 --> 00:22:07.080

Tracey Seabolt: In section a our personnel expenses your individually list each staff position supported by the grant and provide the annual salary.

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00:22:07.440 --> 00:22:16.650

Tracey Seabolt: and level of effort as a percentage of the F T devoted to this award remember to only include positions that are supported by the application narrative.

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00:22:17.040 --> 00:22:27.270

Tracey Seabolt: and make sure not to include the value of direct Community service performed by volunteers unless it's for organizational functions such as accounting or auditing or training.

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00:22:28.350 --> 00:22:38.460

Tracey Seabolt: In addition, if you have multiple americorps grants it's a good idea to confirm you're not over budgeting, that is, including more than 100% of staff time on your budgets.

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00:22:39.030 --> 00:22:47.550

Tracey Seabolt: You can do this by including a statement in each line at the end of the section that says, the percentage of time allocated to this budget.

127

00:22:48.060 --> 00:22:58.740

Tracey Seabolt: does not exceed 100% across all americorps brands, additionally, you should confirm that the salary information you provide is consistent across multiple brands.

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00:22:59.340 --> 00:23:21.840

Tracey Seabolt: And while it might be appropriate to budget, the executive director salary at 89,000 on one application in 99,000 on another you know, six months later, you can justify that saying that you know this is related to cost of living and performance related salary increases.

129

00:23:27.210 --> 00:23:43.680

Tracey Seabolt: on the fringe section, you will identify the type of fringe benefit for example fica workers COMP retirement state employee unemployment, health and life insurance IRA, you know all of those fringe benefits for each staff.

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00:23:44.160 --> 00:23:52.200

Tracey Seabolt: And those fringe benefit cost should align with the salary lines, that is, the section should only include staff included in the personnel.

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00:23:52.890 --> 00:24:08.280

Tracey Seabolt: Expenses section if the benefit amount is more than 30% of the salary costs, you must list covered benefits separately and justify that cost and Monet, can I ask you, can you take over the presentation for just a bit place.

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00:24:09.960 --> 00:24:10.680

Monae Porter: sure.

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00:24:11.100 --> 00:24:14.520

Monae Porter: favorite we're starting on Section see.

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00:24:14.880 --> 00:24:16.260

Tracey Seabolt: Travel yes.

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00:24:16.350 --> 00:24:17.580

Tracey Seabolt: Thank you so much.

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00:24:17.940 --> 00:24:30.150

Monae Porter: Alright guys so i'm going to pick up where she left off, and that is section C, which is travel, so it was important to please include the purpose of costs and the type of trip trip.

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00:24:31.200 --> 00:24:41.460

Monae Porter: Travel such as air ground transportation lodging per diem you'll also want to include the number of TRIPS and the number of staff or members traveling.

138

00:24:42.000 --> 00:24:52.830

Monae Porter: Make sure this calculation is clear and simple to follow and you should note that americorps sponsor technical assistance is an expectation of all applicants and travel funds.

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00:24:53.160 --> 00:25:03.750

Monae Porter: And should be met, it should be budgeted for new grantees and new staff of existing grantees to attend to americorps symposium pre conference events.

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00:25:05.130 --> 00:25:13.950

Monae Porter: So it is important to take care to separate staff and Member travel costs and ensure that training costs are not included in this section.

141

00:25:14.280 --> 00:25:34.920

Monae Porter: And that travel costs are not included in the training lines, so you may budget mileage at a higher rate than the federal reimbursement rate, which is 56 cents per mile as of January first 2020 if that follows your organization's policy and, if so, make a note of that, in the budget narrative.

142

00:25:36.660 --> 00:25:53.700

Monae Porter: Now, moving on to section D, which is equipment these expenses are defined as tangible non expendable personal property having a useful life of more than one year and acquisition costs of \$5,000 or more per unit.

143

00:25:54.480 --> 00:26:12.060

Monae Porter: It is less than that amount that expense will go into the supplies section equipment is limited to 10% of total americorps funds requested and you should be sure to show the unit costs in number of units with purpose of equipment in your budget.

144

00:26:14.700 --> 00:26:27.030

Monae Porter: And now we're moving on to section E, which is supplies these costs are customizable supplies and materials, which includes Member service gear so americorps identity items.

145

00:26:28.050 --> 00:26:39.000

Monae Porter: Preferably clothing, with the logo is a required budget expense and it may be charged to the americorps share only if it includes the americorps logo that's important.

146

00:26:39.630 --> 00:26:50.820

Monae Porter: Applicant should make a note in the budget narrative within the items include the americorps logo and you may charge safety gear to the americorps share, regardless of whether or not it has a logo.

147

00:26:51.600 --> 00:27:05.580

Monae Porter: organizations must purchase all other Member service gear with non americorps funds and you should make sure that you are individually listing single I line I call \$1,000 or more.

148

00:27:07.980 --> 00:27:19.830

Monae Porter: Now, moving into section F, which is the contractual and consultant services, you will include all contractual and consulting services, except training and evaluation consultants.

149

00:27:20.190 --> 00:27:28.590

Monae Porter: While americorps does not impose a maximum daily rate, we ask that you include the basis on which you would determine the expense, which could be a daily rate.

150

00:27:29.040 --> 00:27:44.010

Monae Porter: And again, do not include the value of the direct Community service performed by volunteers here or in the personnel section, unless it is for organizational functions such as accounting, auditing or equipment maintenance.

151

00:27:46.320 --> 00:27:55.980

Monae Porter: Okay, moving forward to section Section G, which is training, this includes expenses related to both staff and Member training.

152

00:27:56.460 --> 00:28:10.680

Monae Porter: So for staff training, this will enhance staff skills for effective project implementation and Member training, support Members as they carry out their service activities, and this may include life after a mere core training.

153

00:28:11.310 --> 00:28:21.000

Monae Porter: So be sure to include the daily rate again for consultants if us and, if not use insert some type of detail to justify the cost.

154

00:28:23.730 --> 00:28:26.550

Monae Porter: Okay, moving forward to section eight which is.

155

00:28:27.660 --> 00:28:31.110

Monae Porter: Evaluation This includes project evaluation clause.

156

00:28:32.490 --> 00:28:42.570

Monae Porter: If you have additional staff members consultants evaluation instruments, etc, this is not for assessing progress towards performance measures.

157

00:28:42.870 --> 00:28:55.950

Monae Porter: But is the evaluation of impact on the Community and assessment of the overall programs designs in system and again if you're using consultants, make sure that you are, including the daily rate.

158

00:28:58.980 --> 00:29:06.780

Monae Porter: Now, moving forward with Section I, which is other program costs and this section, this is kind of the catch all category.

159

00:29:07.500 --> 00:29:25.290

Monae Porter: For those project expenses that don't really fit neatly into the other categories, so in this section, you must include the national service criminal history checks for your Members employees and anyone else who receives a salary education award living allowance or stipend.

160

00:29:26.460 --> 00:29:34.710

Monae Porter: So, if not included, you must explain how these costs are cover or if someone has already had this check, you can include that.

161

00:29:35.340 --> 00:29:44.820

Monae Porter: In this section, you will also include office space utilities phone and Internet and similar expenses for Members and project staff.

162

00:29:45.270 --> 00:29:56.010

Monae Porter: and providing extensive are not included as part of the organizations approved indirect costs and that they are pro rated and appropriately allocated to this program.

163

00:29:57.360 --> 00:30:10.260

Monae Porter: You may also include Member reckons sorry, you may also include Member organization calls, which are allowable if appropriately justified, and if they exclude gifts in foods provided in the entertainment setting.

164

00:30:10.680 --> 00:30:24.150

Monae Porter: And finally multi State applicants may include sub grants, including the approx approximate number and average amount of the wars and show any requires sub grantee match in the grantee share column.

165

00:30:26.040 --> 00:30:33.330

Monae Porter: And so again we're going to have a brief pause if you have any questions you can enter them in the Q amp a panel now.

166

00:30:34.410 --> 00:30:38.430

Tracey Seabolt: Thank you so much for covering that I appreciate it Monet.

167

00:30:38.520 --> 00:30:39.180

Of course.

168

00:30:41.790 --> 00:30:42.060

Tracey Seabolt: I.

169

00:30:42.120 --> 00:30:55.530

Tracey Seabolt: do want to chime in I know, one of the the and I don't see any questions in here so i'm gonna going to ask one, or at least price provide some clarification I know one question that we see a lot is.

170

00:30:56.820 --> 00:31:07.110

Tracey Seabolt: Is applicant to asking about food in their their budget, and you know, one of the things we talked about before was reasonable necessary.

171

00:31:08.520 --> 00:31:16.770

Tracey Seabolt: And so food that is provided during the dissemination of information, such as like a training event and you were talking about the training costs.

172

00:31:17.490 --> 00:31:32.730

Tracey Seabolt: That is allowable additionally if let's say you're doing a day long training and you were going to put in a half an hour 45 minute break for food, but logistically to go off site to get food is just so time consuming.

173

00:31:34.080 --> 00:31:48.210

Tracey Seabolt: It would would really take away from the training itself, so in that case food could be allowable so in those cases applicants should make note of situations and justify that in the budget narrative.

174

00:31:50.880 --> 00:32:04.110

Tracey Seabolt: So we are going to move on and look at a few budget narrative sample entries and we're going to talk through some of the common clarification issues that that you as an applicant can avoid.

175

00:32:04.620 --> 00:32:23.820

Tracey Seabolt: So on this sample that you're seeing on the screen right now there are several errors on here and i'd like you to take a look at it and in the chat enter any errors that you identify, please, and while you're doing that.

176

00:32:25.350 --> 00:32:28.410

Tracey Seabolt: i'm going back to mary's question in the chat.

177

00:32:29.640 --> 00:32:40.140

Tracey Seabolt: Would the food be included in the training line items So yes, if if you're conducting like I was saying before a day long training and.

178

00:32:40.620 --> 00:32:51.660

Tracey Seabolt: you're going to have a program to lunch or you're going to have lunch, because you know the nearest restaurant is 20 minute drive away.

179

00:32:52.260 --> 00:33:06.750

Tracey Seabolt: you're going to bring in food for them, then yes, that would be part of your training section and you would just identify in there, the justification for that you know that you would put program to lunch or.

180

00:33:07.770 --> 00:33:23.550

Tracey Seabolt: You know, to to avoid the disruption of information or you know some some language, because he grants does have character limits, so we we don't want to go too crazy with the justification, but give us enough info.

181

00:33:24.600 --> 00:33:27.630

Tracey Seabolt: You are justifying why you're putting food in there.

182

00:33:29.970 --> 00:33:44.250

Tracey Seabolt: So I don't see any comments in the chat related to this, this sample that you right now there we go Thank you Patricia breakdown and costs related to see ncs sponsored training.

183

00:33:45.240 --> 00:33:55.290

Tracey Seabolt: Yes, exactly, so in that first line there is that americorps sponsored grantee training that we said was a required line item.

184

00:33:55.620 --> 00:34:10.980

Tracey Seabolt: But the applicant neglected to include a cost calculation to explain how they determined that 20 \$498 so, even though this is a required line item we still need to know that this meets the prudent person standard.

185

00:34:11.460 --> 00:34:18.630

Tracey Seabolt: For example, what if this training was in Washington DC and the grantee was in Maryland.

186

00:34:20.130 --> 00:34:29.310

Tracey Seabolt: I can assure you, as someone who lived most of my life in Maryland it does not cost 20 \$400 for me to get to to DC.

187

00:34:30.180 --> 00:34:38.910

Tracey Seabolt: So you know, this is where it's showing that that that would or would not be reasonable, so we want to know what is it you're covering in that calculation.

188

00:34:39.810 --> 00:34:59.010

Tracey Seabolt: If you look down to the second line item you'll see that the applicant proposed a mileage rate higher than the federal rate and as Monet said, this is allowable providing that it aligns with the organization's policy and the applicant could avoid having to clarify this by.

189

00:35:00.360 --> 00:35:12.750

Tracey Seabolt: just making a budget notation saying that this follows the organization's travel policy and, if you look down to that last line you'll see an example of that kind of a justification.

190

00:35:14.940 --> 00:35:18.660

Tracey Seabolt: The third line item, you may not have been able to figure out yet.

191

00:35:18.960 --> 00:35:27.540

Tracey Seabolt: Because it requires probably getting out your calculator but basically it shows that the applicant didn't double check the calculations for accuracy.

192

00:35:27.810 --> 00:35:45.600

Tracey Seabolt: So what they have in that description totals \$2,050 rather than what's in the budget of the 1900 \$54, and this is often a result of applicants going in and revising the budget and they forget to go back and revise the clarify calculation.

193

00:35:47.370 --> 00:35:53.490

Tracey Seabolt: So I again, I just want to draw your attention to that so that it's something you can be aware of.

194

00:35:54.180 --> 00:36:00.510

Tracey Seabolt: And then the last line in the section includes cost for Member travel and while that's absolutely allowable.

195

00:36:01.200 --> 00:36:11.310

Tracey Seabolt: And this is appropriately detailed there's a specific Member travel section so it's important to make sure you're entering the line items in the right section.

196

00:36:11.850 --> 00:36:20.700

Tracey Seabolt: So, if you look at this example at the bottom of the screen, it shows a correct and comprehensive entry and it's got all of the correct detail.

197

00:36:21.450 --> 00:36:31.350

Tracey Seabolt: Including the number of individuals traveling the number of travel days miles traveled mileage rate all of those details that we need, and there are no erroneous costs included.

198

00:36:31.920 --> 00:36:43.140

Tracey Seabolt: So this is the the good version down at the bottom, that we want to see in your applications we're going to also look at a sample from the supply section of the budget narrative.

199

00:36:43.860 --> 00:36:54.840

Tracey Seabolt: i'm taking a quick look at this I don't know what you all are seeing here i'll give you a second to to enter some errors in here in the chat.

200

00:37:12.060 --> 00:37:22.710

Tracey Seabolt: Marisa no narratives correct that computers for new staff we have absolutely no idea what that means is that one new staff to new staff.

201

00:37:23.070 --> 00:37:34.410

Tracey Seabolt: Is it one computer 10 computers, we just don't know so again we can't figure out if its reasonable unnecessary it's if you look at that office supplies line.

202

00:37:35.430 --> 00:37:50.790

Tracey Seabolt: The calculation might be correct, but it seems like it's only based on 10 months of cost and maybe that's All they need I don't know but they haven't told us that and so that's why we want to get additional information there.

203

00:37:52.050 --> 00:37:58.890

Tracey Seabolt: The the third one, the Member supply line, I want to draw your attention to, because it.

204

00:38:00.120 --> 00:38:17.970

Tracey Seabolt: it's got the number of Members it's got a cost per Member, but if you look at the calculation it's slightly higher than what's budgeted actually total \$7,030 and remember, we said that part of the assessment was to look at calculation accuracy.

205

00:38:20.400 --> 00:38:27.450

Tracey Seabolt: We want to be able to die you some wiggle room So if you add a term like average or approximate.

206

00:38:28.650 --> 00:38:36.480

Tracey Seabolt: You know terms like that they give you some flexibility that could help you avoid having to clarify this down the road.

207

00:38:37.710 --> 00:38:49.140

Tracey Seabolt: The other thing I want to point out is that you know we talked about the required Member service scared that is not included in this in this example.

208

00:38:49.770 --> 00:38:59.640

Tracey Seabolt: So, if you look at this second version you'll see it's got the detail, we need for for the office supplies and the computers.

209

00:39:00.060 --> 00:39:16.950

Tracey Seabolt: And that average word added to the Member supplies and then on the top line we've added that required to line item for the Member service gear, with all of the detail that we need so again, this is a much better far more compliant budget narrative.

210

00:39:20.340 --> 00:39:28.410

Tracey Seabolt: All right, let's move on to section two which focuses on the Member cost, and specifically the Member living allowances and support costs.

211

00:39:29.310 --> 00:39:41.340

Tracey Seabolt: So one thing I do want to point out is if you're applying for a planning grant remember your your budget will not include any Member costs, so there won't be any section to for your application.

212

00:39:43.680 --> 00:39:55.020

Tracey Seabolt: As I mentioned before the Novo stipulates that minimum and maximum living allowances this year's full time living allowance ranges from 16,000 to 32,000 per Member.

213

00:39:55.620 --> 00:40:03.390

Tracey Seabolt: And the budget narrative must identify the number of members in each category and the living allowance amount that they will receive.

214

00:40:04.890 --> 00:40:11.790

Tracey Seabolt: When you get down to those Members support costs they'll follow the laws of the states where the Members are serving.

215

00:40:12.720 --> 00:40:25.770

Tracey Seabolt: fica unless exempted by the irs is 7.65% of the total living allowance and you must also include health care coverage for all full time Members now.

216

00:40:26.640 --> 00:40:40.950

Tracey Seabolt: programs main may want to offer full health care to less than full time members, but you cannot pay for it with these americorps funds unless those are less than full time members.

217

00:40:41.310 --> 00:40:54.600

Tracey Seabolt: That are serving in a full time capacity for a sustained period, such as a full time summer program and in that case you should note that you know these are our Members that are serving in a full time capacity.

218

00:40:56.310 --> 00:41:02.850

Tracey Seabolt: Excuse me you'll also note the number of Members receiving the benefit and the PR person cost in that calculation.

219

00:41:04.110 --> 00:41:18.990

Tracey Seabolt: And if you know going back again to the accounting department helping you with some of the history if you're calculating cost, based on the percentage of Members that historically have accepted this benefit then you'll just note that in the justification.

220

00:41:20.430 --> 00:41:28.920

Tracey Seabolt: I also want to point out if you're using Indian Health Services coverage to provide healthcare two full time or less than full time members serving in a full time capacity.

221

00:41:29.280 --> 00:41:39.660

Tracey Seabolt: You cannot include that as part of your match, however, because we want to make sure that you're showing us that you're you're offering those services to these Members.

222

00:41:40.500 --> 00:41:55.980

Tracey Seabolt: And you should enter that in your budget narrative and just make a notation that you're providing the benefit with ihs and enter zero as the cost and you would just enter it for the total amount for the grantee share and for the americorps share.

223

00:41:58.170 --> 00:42:03.690

Tracey Seabolt: You may include workers compensation costs if the state where the Members are serving requires a.

224

00:42:04.050 --> 00:42:19.800

Tracey Seabolt: And if it's not required by the state, the programs must obtain occupational accidental death and dismemberment cub coverage for Members and just know that is on you, the applicant to check to make sure what's required and what is not.

225

00:42:21.060 --> 00:42:37.560

Tracey Seabolt: unemployment insurance and other Member support costs must also include adequate calculation details and the unemployment insurance can only be charged to the grant if it is mandated by State law.

226

00:42:38.940 --> 00:42:50.220

Tracey Seabolt: So let's look at some Member support costs examples and again i'll ask your help here to enter in the chat any errors that you see here, please.

227

00:42:58.470 --> 00:42:59.850

Tracey Seabolt: Anything jump out at you.

228

00:43:13.500 --> 00:43:31.980

Tracey Seabolt: yeah um they included that fica for the Members, but the application instructions tell us that it must be calculated 7.65% of the total living allowances and they use 5%.

229

00:43:32.340 --> 00:43:37.290

Tracey Seabolt: Also, if you look here yeah Thank you Patricia for you getting that as well.

230

00:43:38.160 --> 00:43:46.650

Tracey Seabolt: If you look here they've added the health care they noted it's provided by Indian Health services they gave us the calculation for it.

231

00:43:47.040 --> 00:43:57.840

Tracey Seabolt: But they put the amounts in the budget and, as I said, you cannot charge that to the the match so we'll look at what that should look like or could look like.

232

00:43:58.500 --> 00:44:20.160

Tracey Seabolt: i'm also note on this one there's no workers COMP or the the alternative for that so again if that state requires work or COMP, then you need to include it otherwise occupational accidental death and dismemberment coverage must be included so again let's look at a at a correct example.

233

00:44:23.280 --> 00:44:38.130

Tracey Seabolt: And this will show you the correct fica calculation additionally there we've got that health care line that's got that zero dollar line item, and you know I often tell folks if you want to give us more information.

234

00:44:38.820 --> 00:44:51.480

Tracey Seabolt: As as a place where you can give more detail about some other line items by just putting zeros in all of the fields and you've got some space for some narrative so it's the same same concept there.

235

00:44:51.960 --> 00:45:01.830

Tracey Seabolt: And then they've added the workers COMP there at 2% of the the Member living allowance, so there we've got our bottom example is the correct example.

236

00:45:03.750 --> 00:45:13.920

Tracey Seabolt: we're going to move on to the administrative or indirect costs, and I know that Mary that was your concern about calculating those indirect costs.

237

00:45:14.250 --> 00:45:27.630

Tracey Seabolt: So those are your general or centralized costs they support the project, they don't include this specific project cost, they could be included in an organization to indirect costs rate agreement if there is one.

238

00:45:29.070 --> 00:45:43.350

Tracey Seabolt: And i'm just going to pause for a second and go back to mary's question 2% standard, it was just the example in this in this budget, so you, it would be on you to find out what the rate is for that line item.

239

00:45:46.710 --> 00:45:58.260

Tracey Seabolt: So i'm going to carry on with indirect costs if you choose to include indirect costs in your budget and it is a choice, you are not required to include indirect costs.

240

00:45:58.800 --> 00:46:10.950

Tracey Seabolt: You should know that there are three methods for calculating those costs and regardless of the method, the americorps sherry's always limited to 5% of total americorps awards fun of.

241

00:46:11.550 --> 00:46:22.170

Tracey Seabolt: americorps award funds expended so you will budget for up to 5% of the total americorps award.

242

00:46:22.860 --> 00:46:30.990

Tracey Seabolt: Budget, but then when you're actually allocating them if you get an award and you're allocating those it would be based on what's expended.

243

00:46:31.770 --> 00:46:46.680

Tracey Seabolt: So we're going to start with that corporation fixed percentage method and you'll often hear that referenced is the 510 fixed option it's that's how it's referenced in the application instructions, but in that case.

244

00:46:47.490 --> 00:46:56.910

Tracey Seabolt: grantees can charge administrative costs without a federally approved indirect cost rate and without documentation to support the allocations.

245

00:46:57.390 --> 00:47:04.500

Tracey Seabolt: So applicants can allocate 5% of the americorps share of direct costs to the americorps share of administrative costs.

246

00:47:04.830 --> 00:47:14.580

Tracey Seabolt: And then 10% of all direct costs and that's the total of both the americorps and the grantee shares to the grid share of administrative costs.

247

00:47:15.540 --> 00:47:29.010

Tracey Seabolt: And you will follow the guidance in the application instructions to calculate the maximum allowed if you're allocating less

than the maximum allowed, please note the percentage claimed in the budget narrative.

248

00:47:31.260 --> 00:47:37.650

Tracey Seabolt: As applicants have a federally approved indirect costs rate, they must use this method.

249

00:47:38.100 --> 00:47:48.930

Tracey Seabolt: And that approved rate agreement constitutes documentation of the administrative costs and i'm guessing Mary that you have an indirect cost rate of 21.7%.

250

00:47:49.350 --> 00:47:59.850

Tracey Seabolt: And so we'll talk about that and we'll look at an example of that in just a minute to but, again, the americorps share is limited to 5% of americorps funds.

251

00:48:00.720 --> 00:48:13.110

Tracey Seabolt: And, and then the rest can go into the grantees share when you're using this you want to specify the cost type, that is, whether it's a provisional or pre determined or fixed or a final rate.

252

00:48:13.650 --> 00:48:24.840

Tracey Seabolt: And you'll supply the rate and the base on which it is calculated so some rates are based on total salaries some on modified total direct costs and so on.

253

00:48:25.380 --> 00:48:38.010

Tracey Seabolt: And then again you'll follow the guidance in the application instructions to calculate the maximum allowed and again if you're if you're allocating less than the maximum you'll note the percentage claimed.

254

00:48:39.600 --> 00:48:52.500

Tracey Seabolt: You must also enter the details of the approved negotiated indirect cost rate agreement in a grants and the application instructions have detail for determining that.

255

00:48:53.550 --> 00:49:00.720

Tracey Seabolt: And then the third calculation method which is available to organizations who do not have a federally negotiated indirect cost rate.

256

00:49:01.440 --> 00:49:10.500

Tracey Seabolt: And who received less than \$35 million indirect federal funding is the de minimis rate of 10% of total direct costs.

257

00:49:11.040 --> 00:49:19.890

Tracey Seabolt: And it's important to note, if this option is elected the organization must use it consistently across all of the organizations federal awards.

258

00:49:20.850 --> 00:49:40.350

Tracey Seabolt: and guidance for calculating these costs with each of the methods is in the application instructions and I will just ask you to please pay close close attention to that guidance about the calculations, it will save you having to correct your calculations during the resolution period.

259

00:49:44.430 --> 00:49:55.440

Tracey Seabolt: So let's look at some indirect costs line items, the first one, we see here is showing that corporation fixed or 510 percent option.

260

00:49:56.010 --> 00:50:13.350

Tracey Seabolt: And, as demonstrated they're claiming the full 5% and you'll see that it's calculated at 5.2% of the total c&c a share of direct costs, and that is, according to the application instructions so you'll follow that and then.

261

00:50:14.070 --> 00:50:19.920

Tracey Seabolt: they're claiming less than the 10% of the grantee share that's fine they can do that.

262

00:50:20.310 --> 00:50:35.940

Tracey Seabolt: But again, as I mentioned before, whenever you're claiming less than the maximum allowed just make a notation in there that way, we know you didn't make a math there you intentionally are are charging less or budgeting less.

263

00:50:37.170 --> 00:50:45.630

Tracey Seabolt: The second example that we have here is an example of it's an applicant with a federally approved indirect cost rate.

264

00:50:46.200 --> 00:50:57.120

Tracey Seabolt: And, as shown in the instructions, they provided the cost type the basis on which it's calculated the approved rate, the rate claimed and a detailed cost calculation.

265

00:50:57.720 --> 00:51:09.960

Tracey Seabolt: And you'll see here they again they claim to the full 5% of the americorps share using the calculation in the instructions and then the remaining amount is included in the grantee share.

266

00:51:13.050 --> 00:51:25.200

Tracey Seabolt: And as a reminder, if you have a negotiated rate you've got to put that in a grants and the guidance for that is in the application instructions so Mary going back to your.

267

00:51:25.740 --> 00:51:41.070

Tracey Seabolt: question about the 21.7 so you take your 5% again you calculate your 21% based on whatever that rate is and the base and then you take your 5% of the cnc F sharp direct costs.

268

00:51:42.000 --> 00:51:51.840

Tracey Seabolt: deduct that from the maximum allowed for you, and then the remaining amount is the Max that you can enter into the grid T share.

269

00:51:56.820 --> 00:52:02.400

Tracey Seabolt: Alright, Monday, do we have any new questions that have come up in the Q amp a panel.

270

00:52:05.460 --> 00:52:06.360

let's see.

271

00:52:11.280 --> 00:52:13.560

Monae Porter: I don't see any questions, right now, but.

272

00:52:15.030 --> 00:52:26.760

Monae Porter: I have a question, and that is what what channel organization do if they're federally negotiated indirect cost rate expired and they haven't received approval yet for a new rate.

273

00:52:28.320 --> 00:52:35.850

Tracey Seabolt: that's an excellent question and I think Mary will probably agree with you that it's an excellent question because I see that she put it in the chat.

274

00:52:37.500 --> 00:52:44.550

Tracey Seabolt: And so it's important to remember your budgeted rate must match the night crud details in he grants.

275

00:52:45.150 --> 00:52:50.370

Tracey Seabolt: And so you want to note that the new approval is pending.

276

00:52:51.030 --> 00:53:03.390

Tracey Seabolt: And you want to provide an expected approval date in your budget narrative so let's say you know let's look at this example here in in example be with this provisional rate.

277

00:53:04.830 --> 00:53:20.070

Tracey Seabolt: If if you were looking at where you enter it in he grants, it would actually tell you the date that it expired let's say maybe it's June 30 2021 so we know today that rate is expired.

278

00:53:20.760 --> 00:53:36.960

Tracey Seabolt: But you've been working with your cognizant agency to get a new rate and you're expecting it any day but you've got to submit this budget, so you could put in the budget narrative and I would suggest right there in that calculation line.

279

00:53:38.070 --> 00:53:55.080

Tracey Seabolt: You know that that current rate expired 630 2021 new rate pending do we in by that say July 31 2021 you know, give us give us, whatever information, you can give us.

280

00:53:56.820 --> 00:54:10.050

Tracey Seabolt: If the rate is not approved by the time of the award we may request that you go ahead and revise the budget, using the current are using the fixed percentage that 510 percentage.

281

00:54:10.980 --> 00:54:19.650

Tracey Seabolt: In rare circumstances, we will approve the award with a special condition that you would have to amended upon receipt of your new rate.

282

00:54:20.490 --> 00:54:31.710

Tracey Seabolt: But for the most part, I would say, at least, right now, while this is pending assuming that your rate is pending and that you're waiting to get this back any any day.

283

00:54:32.610 --> 00:54:48.780

Tracey Seabolt: Go ahead and give us that detail, and you know if, on the flip side, this is a rate and you're in negotiation and you're really not expecting to get it back in the next three months, then submit it with the the 510 fixed.

284

00:54:51.120 --> 00:54:58.530

Tracey Seabolt: All right, I am going to keep us moving because we're getting close to time and we've got a little bit more content to get through here with you all.

285

00:54:58.950 --> 00:55:03.450

Tracey Seabolt: So this lacks last section of the budget narrative is the source of fun section.

286

00:55:04.200 --> 00:55:12.690

Tracey Seabolt: Here you do not list specific line item cost, but rather the source of those resources that are covering your line item expenses.

287

00:55:13.170 --> 00:55:23.940

Tracey Seabolt: So, if you look in budget, Section three there's a tab there and you'll see a link to enter the source of matching funds and you'll see that here on the screen.

288

00:55:24.360 --> 00:55:33.810

Tracey Seabolt: Once you click that link a new screen appears and that's where you note the source, the amount of the match the classification, that is, whether it's cash or in kind.

289

00:55:34.170 --> 00:55:53.400

Tracey Seabolt: And the type of match whether its private state or local federal so just you to enter all of this information I caution you on those drop down menus to be very careful with them they're very sensitive so sometimes you can put the wrong information in there inadvertently.

290

00:55:54.570 --> 00:56:04.320

Tracey Seabolt: When it's complete the source of fun section might include content that's similar to this example we're getting ready to post.

291

00:56:06.390 --> 00:56:10.320

Tracey Seabolt: And once it comes up here, you will see that there we go.

292

00:56:10.800 --> 00:56:24.690

Tracey Seabolt: That it only includes the source of match, not those line items that are covered covered by the matching resources and it gives us all the detail, it tells us if it's secured or propose it tells us whether it's cash or in kind and and so on.

293

00:56:26.100 --> 00:56:33.240

Tracey Seabolt: So you know just pay very close attention again to the drop down menus to all of the required information.

294

00:56:33.630 --> 00:56:46.680

Tracey Seabolt: And also remember, and we said this before if it cost us on allowable as part of the americorps share it's also an allowable as part of the grant T share or your match, and if you're not sure.

295

00:56:47.190 --> 00:57:05.010

Tracey Seabolt: Whether it's allowable or not check the uniform guidance and again, as I mentioned, we have that sample budget narrative that we use for all of these examples we'll post that to the funding page, you can use that as a resource also when you're developing your budget narrative.

296

00:57:06.120 --> 00:57:15.420

Tracey Seabolt: um, so let us move on Monet do you wanna give us some budgeting tips here.

297

00:57:15.900 --> 00:57:17.550

Monae Porter: Yes, I can definitely do that.

298

00:57:17.610 --> 00:57:18.240

Tracey Seabolt: Great thanks.

299

00:57:19.290 --> 00:57:21.390

Monae Porter: Before we close, I want to offer you guys a.

300

00:57:21.390 --> 00:57:29.790

Monae Porter: few pointers, beginning with the guidance to check and double check your work to make sure you're eliminating erroneous information.

301

00:57:30.210 --> 00:57:41.520

Monae Porter: As Tracy had previously noted, I want to stress the benefits of involving your team, and someone outside of your team and the budget development and the route in the review process.

302

00:57:42.570 --> 00:57:57.930

Monae Porter: I recommend using the tips that you see on this visual and the budget budget checklist that is found on attachment F of the application instructions to make certain that you submit an accurate budget narrative that meets the American tours requirement.

303

00:57:59.010 --> 00:58:05.430

Monae Porter: highlights of the budget checklist include one making sure it meets America has caused guidelines.

304

00:58:05.850 --> 00:58:15.690

Monae Porter: Other important things to know is, is your full time living allowance within the minimum and maximum levels, which is between 16 and 32,000.

305

00:58:16.230 --> 00:58:23.580

Monae Porter: And it's important to note that the cost of the Ms y is less than \$18,000 for cost reimbursement applications.

306

00:58:23.880 --> 00:58:36.060

Monae Porter: And while he grants will calculate this for you, you can get a head start by determining the cost of the Ms why by dividing the total amount of America or funds that you're requesting by the total total number of.

307

00:58:36.750 --> 00:58:50.010

Monae Porter: Ms was requested so, for example, if you have an application that is \$100,000 in America wars funds, and you have 10 Ms wise, then the cost per Ms Why is \$10,000.

308

00:58:51.450 --> 00:59:01.200

Monae Porter: And you should know that the cost per emma's, why does not include childcare or the cost of the seagull education award that a Member could earn.

309

00:59:01.950 --> 00:59:22.560

Monae Porter: If you are existing grantee American express that your cost per Ms why will be lower than previous years, you also want to make sure that your budget includes the minimum required match and make sure that the source of your matching funds are detailed and aligned with your total budget.

310

00:59:24.150 --> 00:59:32.550

Monae Porter: You want to also check that the budget includes all required costs, such as the americorps Member gear Member fica.

311

00:59:33.300 --> 00:59:41.760

Monae Porter: FT Member healthcare, along with the cost that americorps strongly recommends that applicants have such as.

312

00:59:42.210 --> 00:59:50.940

Monae Porter: stuff for America course Technical Assistant events and new staff attendees at americorps symposium pre con effects.

313

00:59:51.600 --> 01:00:04.500

Monae Porter: As much as possible, keeping in mind with the grunts character limits the budget narratives to provide details, including the purpose and accurate calculation and you want to make sure that these are in.

314

01:00:04.890 --> 01:00:16.470

Monae Porter: Whole dollars and make sure that we are excluding on allowable costs, I remember, I recommend that applicants use the zero dollar line items to enter additional clarification needed.

315

01:00:16.980 --> 01:00:22.920

Monae Porter: And also again make sure that someone is checking the capital calculations before you submit your application.

316

01:00:23.610 --> 01:00:30.600

Monae Porter: And finally, and most importantly sure sure that you're aligned that you align your budget narrative to the program goals.

317

01:00:30.960 --> 01:00:43.860

Monae Porter: And the application narrative including miscellaneous contingency or other undefined budget amounts that could adversely impact your application status, which we do not want.

318

01:00:46.500 --> 01:00:47.910

Monae Porter: So, moving forward.

319

01:00:49.800 --> 01:01:00.330

Monae Porter: You want to make sure, in addition, before submitting your application um you want to make sure that you have an active registration with the system for award management, also known as Sam.

320

01:01:00.780 --> 01:01:09.240

Monae Porter: And if you are applying for the first time, it is strongly recommended that you apply early because it can take a while to activate your registration.

321

01:01:09.540 --> 01:01:20.850

Monae Porter: And americorps also recommends that if it is your first time or you are renewing your registration, you will allow for three weeks prior to the application deadline, just in case any.

322

01:01:22.110 --> 01:01:33.960

Monae Porter: there's any issues that could occur that gives us time to figure that out, it is important to note that Sam is not something this account is not something that you should have to pay for.

323

01:01:34.860 --> 01:01:45.930

Monae Porter: If you are a new or Rican competing apply it applicant you're submitting i'm sorry if you are a new or re competing applicant you submitting your operational and.

324

01:01:46.380 --> 01:01:59.670

Monae Porter: Financial minute survey as a struct on the funding page and you also should make sure you've submitted your most recent single audit to the Federal Audit clearinghouse and a form of your 992 the guide star.

325

01:02:00.150 --> 01:02:09.870

Monae Porter: And you have to make sure that you have entered your current federally negotiated indirect costs details, if you have one any grunts.

326

01:02:11.040 --> 01:02:18.930

Monae Porter: And details for all of these actions, because I know that I listed a lot of things they are are found on the funding page americorps.gov.

327

01:02:21.120 --> 01:02:28.140

Monae Porter: Finally, americorps is aware that on some occasion there are some challenges with the current system.

328

01:02:28.980 --> 01:02:38.550

Monae Porter: He grants automatically performs a limited client on compliance checks to validate your budget and you might get a warning or error message.

329

01:02:39.300 --> 01:02:46.890

Monae Porter: Some of these messages may prevent you from submitting your application so you should be aware of which one you're receiving and how to proceed.

330

01:02:47.250 --> 01:02:57.750

Monae Porter: So, for example, if you receive a warning message you can move forward, but the application or budget might not be compliant with americorps guidelines.

331

01:02:58.320 --> 01:03:09.060

Monae Porter: However, if you receive an error message you will not be able to move forward until you correct the error and you must resolve all of the areas before you can submit your application.

332

01:03:09.900 --> 01:03:21.090

Monae Porter: So if you experience a challenge, other than what I listed the warning or the error message you should contact the americorps hotline right away, and the number is listed on the slide.

333

01:03:21.510 --> 01:03:36.540

Monae Porter: And it's Also, why is that if you're experiencing errors you'll get a service ticket and you should email that to us at a mayor corps grant@cnn.gov just so we have a documentation of the problem and so that we can work through it together.

334

01:03:38.790 --> 01:03:50.670

Monae Porter: And finally, I want to draw your attention back to these bullets that Tracy had shared earlier, I encourage you to keep this checklist nearby as you develop your budget and frankly consulted on.

335

01:03:51.090 --> 01:03:59.700

Monae Porter: As a sort of a quality assurance tech checklist many budgets require extensive review just because some of these things listed.

336

01:04:00.720 --> 01:04:13.410

Monae Porter: Are not checked before the budget is submitted, so you will save yourself a lot of time and efforts if, before you submit your budget to America or just check this on bliss really quick just to make sure you have everything on it.

337

01:04:16.830 --> 01:04:25.110

Monae Porter: So now i'm going to pause to see if we have any more final question, and if you have a question, you can enter it in the Q amp a panel now.

338

01:04:26.700 --> 01:04:31.230

Tracey Seabolt: And Monday, there is nothing in q&a or in the chat.

339

01:04:35.970 --> 01:04:40.290

Tracey Seabolt: So Mary Patricia either, if you have any questions this is your chance.

340

01:04:52.830 --> 01:04:56.190

Tracey Seabolt: Okay looks like we're we're good.

341

01:04:57.330 --> 01:04:58.020

Monae Porter: All right.

342

01:04:58.590 --> 01:04:59.340

Tracey Seabolt: let's see.

343

01:04:59.730 --> 01:05:11.700

Monae Porter: So we have reached the end of our time together, I appreciate you guys for responding to this to this final poll, you should see it above to let us know how helpful this session was for you.

344

01:05:12.120 --> 01:05:23.460

Monae Porter: And if there are no other questions i'll Thank you again for your time and for your interest in America wars and I wish you the best in the competition and this concludes today's webinars.

345

01:05:23.610 --> 01:05:24.960

Monae Porter: And you may now disconnect.