

***Unedited Transcript of Fourth Social Innovation Fund
Technical Assistance Call of March 19, 2010, at 1:00 p.m. Eastern Time***

Corporation Note: This is an unedited transcript of the fourth Social Innovation Fund (SIF) technical assistance call. Potential applicants should refer to the NOFA as the primary source of information. An audio recording of this call can be accessed by dialing the following number: 800-873-2129. The audio recording will be available through April 8, 2010.

Coordinator: Good afternoon everyone and thank you for standing by. At this time all participants are in a listen-only mode. After the presentation we will conduct a question and answer session and to ask a question please press star 1.

Today's conference call is being recorded and if you have any objections you may disconnect. I'd now like to turn the call over to your host for today Miss Marta Urquilla. And you may begin ma'am.

Marta Urquilla: Thank you (Catherine). Good afternoon. My name is Marta Urquilla and I'm the Senior Advisor for Social Innovation with the Corporation for National and Community Service. I'm joined today by eGrants Help Desk Team Lead Kelly Williams and Senior Grants Policy Specialist, Shelley Ryan, each also with the Corporation.

I want to thank you for joining this fourth technical - or TA - assistance call with respect to the Corporation's Social Innovation Fund. And I just want to start with a few comments about where we are in our process.

Today's call is a technical call. This will specifically address how to complete a Social Innovations Fund application in the eGrants system. We're going to walk you through a PowerPoint which is available on our Corporation's Website. And we're assuming that you all have that up in front of you and that you've already looked at it.

We are less than three weeks away from the deadline, and we really encourage you to use today's call as a signal about where you should be focusing your attention. At this point all applicants should be fairly along in their process.

We expect intermediary applicants to be familiar with the eGrants system including how to troubleshoot problems, to have a well developed draft of their application narrative and aligned budget and to be in final conversations and negotiations about how to meet the 50% match requirement.

So accordingly most of our TA calls or TA sessions and calls following this phone call will focus on what we perceive to be the most challenging pieces of the SIF application process and those include, number one, completing an adequate budget and, number two, meeting the match requirement.

Although we won't be able to answer budget and match questions we've established these two areas as our focus points for TA moving forward. General inquiries are still welcome at innovation@cns.gov so applicants shouldn't expect significant new FAQs on topics other than the budget and match. And we do plan to release a new FAQ no later than Monday.

So with that I'd like to begin discussion walking us through the PowerPoint which you can find on the Website on the Social Innovation Page. It is specifically under the announcement for the fourth TA call so I hope that you all have that up in front of you.

And this assumes that you've already created an account in eGrants. That is also a PowerPoint which is available on the Website that you all should have accessed by now. Once you've created that account in eGrants you can log in from your homepage and select New.

Then you click on the Select a Program Area dropdown menu and choose Other, then click on Go. You will then select the Social Innovation Fund 2010 NOFA and click on Next.

And then you will be asked for applicant info. You will verify that you've selected the correct NOFA, Social Innovation Fund 2010, and then click on Create a New Project. Notice that the toolbar on the left side of the screen - clicking on any of the titles there will take you directly to that section.

You will then want to type in your project title. And we recommend using the name of the lead organization as your project title. The project state is the state where your organization resides even if you have partners or subgrantees that have been preselected that reside in other states.

The same is true for the other contact information. The email address is the address of the primary contact person. Click on Save and Close when finished. Then click on the Select a Project dropdown menu and choose the name of the project you just created.

Click on the Select a Project Initiative dropdown menu and choose from the list of seven SIF options. It's very important here to focus on those seven SIF options and do not choose any of the others in that dropdown menu. Choose the one that best describes the type of SIF you are proposing. And you should refer to Pages 19-20 in the NOFA for further information.

Enter your organization's Web address and click Next. You will then choose the project director from the dropdown menu. This list is populated from the eGrants account you setup prior to starting your SIF application. There may

be multiple users within your organization or there may be one as seen below. Type in your project's Website if applicable and click Next.

Then you will type in the names of cities, counties or states that you know or plan to include in your application. Your proposed state date should be 09/30/2010. And your proposed end date should be 09/30/2011. Use your narrative to describe your multiyear plan.

Check No regarding State Executive Order 12372. Respond as appropriate regarding federal debt and leave the State Application Identifier field blank. Then click Next.

We now get to the section on narratives. Click on the view/edit narrative for each of the four narrative fields. Copy and paste the narrative from a Word document. We found that this makes the process a lot easier if you prepare it in advance in a Microsoft Word document and then cut and paste into eGrants.

See Page 12 of the NOFA for the required character limit for Executive Summary and the recommended character limits for each of the narrative fields as well as the maximum total character limit allowable.

Note that character limits include spaces and are checked when you validate your application. If you exceed the character limits your application will not validate. Boldface, bullets, underlines or other types of formatting, charts, diagrams and tables will not copy accurately into eGrants.

Once you've entered information in each of the narratives a green checkbox will appear in front of the section title. You must include text in each of the narrative fields in order for your application to validate.

The next slide focuses on documents. See Page 14 of the NOFA for information on match verification. Match verification letters are required to be submitted with your application however we can't receive those through eGrants so those letters must be sent to the following email address, sifapplication@cns.gov.

These cannot be attached through eGrants and your application will be considered incomplete if that match verification letter is not received by the deadline on April 8.

In your email subject line please include your application ID and lead organization name. Once you've sent your letter through email click on the Match Verification dropdown menu and select Sent.

Now if you choose to include additional documents other than the match verification you should first know that they will not be considered as part of the review. We are not asking for supplemental materials other than the match verification. We will not factor those into the evaluation of the application so please understand that.

Should you decide to attach any additional documents you can click on Add a New for each additional document and type in the name of the document. Email the document to sifapplication@cns.gov and choose Sent from the dropdown menu. Click Next.

And I will just say again, no additional documentation is required and so will not be considered during the application review. This is an option that's available as a standard option in the eGrants system. We have also heard from some folks that asked about letters of support and we're just reiterating those will not bear on the review of your application.

The next slide focuses on the Budget Section 1. While your program design may cover up to a five-year period the budget you are submitting is just for Year 1.

Under Project Personnel Expenses click on Add a New Budget Item. Type in the title or name of the position, enter the number of positions with the same title or name, enter the full time equivalent salary for this position and the percentage of time. The total amount is calculated automatically.

Enter the CNCS share and grantee share. Both must add up to the total amount. Click on Save and Close. If you have multiple positions click on Add a New Budget Item as needed.

Personal Fringe Benefits, click on Add a New Budget Item, enter the type of fringe benefits such as FICA or workers compensation and for which position they cover. Enter the calculation used to compute the benefits.

Enter in the total amount and divide between the CNCS share and the grantee share. Click on Save and Close. If you have multiple items click on Add a New Budget Item as many times as needed.

Travel, click on Add a New Budget Item, enter the purpose of the travel, enter the calculation used to compute the travel. Enter the total value for travel and divide between the CNCS share and the grantee share. Click on Save and Close. If you have multiple items click on Add a New Budget Item as many times as needed.

Equipment, click on Add a New Budget Item, enter the item and/or purpose of the equipment. Note that equipment is any single item that is over \$5000.

Enter the quantity and the unit cost. The total amount is auto-populated. Divide between the CNCS share and the grantee share. Click on Save and Close. If you have multiple items click on Add a New Budget Item as many times as needed.

Supplies, click on Add a New Budget Item, enter the supply item. Enter the calculation used to determine the cost of these supplies. Enter the total amount for the supplies and divide between the CNCS share and the grantee share. Click on Save and Close. If you have multiple items click on Add a New Budget Item as many times as needed.

So you're getting a sense here of what the approach is to completing these budget screens.

Contractual and consultant services, click on Add a New Budget Item, enter the type of contractual or consultant service, enter the calculation used to determine the cost of these services, enter the total amount and divide between the CNCS share and the grantee share. Click on Save and Close. If you have other contractual and consultant service items click on Add a New Budget Item as many times as needed.

Other costs, click on Edit in the subgrants line. Type in the total amount you plan to subgrant and divide between the CNCS share and the grantee share. Click on Save and Close. Remember that at least 80% of the federal funds you request must be subgranted.

Click on Add a New Budget Item. If you have additional items in this category enter the purpose, enter the total amount and divide between the CNCS share and the grantee share. Click on Save and Close. If you have other cost items click on Add a New Budget Item as many times as needed.

Applicants may use this section to highlight costs associated with conducting a proposed competitive subgrant selection process if not addressed elsewhere in their budget.

Subtotals, this section will automatically populate based on what you entered in each of the budget sections. Click on Next. Click on Enter Source Of Matching Funds. Enter a description for the match. Enter the amount of the match. Choose the match classification, cash from the dropdown menu.

It must be cash. Choose the match source from the dropdown menu, click on Save and Close. If you have other matching fund sources click on Enter Source of Matching Funds as many times as needed. Complete and then click on Save and Close.

Federally Approved Indirect Cost Rates, click on Edit. Choose the cost type from the dropdown menu, choose cost basis from the dropdown menu. Enter the calculation, rate and rate claimed. Enter the total amount and divide between the CNCS share and the grantee share. Click on Save and Close.

Once your budget is complete click on Validate This Budget. If the CNCS request is more than the matching funds from the applicant you will get an error as stated below. Click on Close and make necessary changes until the grantee (applicant) share is greater than or equal to the CNCS share and click on Validate This Budget.

You will receive this message when your budget is entered correctly: No budget errors were found. The budget has been validated without errors.

Review, now you can review your application. The reports to view and print your full application include the following, application for federal assistance, budget and budget narrative. Click on View/print Report. The other links are inoperable for the purposes of the SIF application.

Authorize and Submit, once you have made all the edits to your application you can Authorize and Submit. Read the authorize and submit information to determine who is the appropriate person to authorize, certify and submit your application.

The authorized representative must have an eGrants account and have either the grantee or grantee administrator role. This is done in eGrants using creating an eGrants account. If you are the correct person to authorize click on the I Agree radio button.

You will see Authorized By and then the name and authorized on the date when correctly authorized. The radio button will still be open, but as long as the authorized by information is there the application has been authorized. Next move to Assurances and click on View/print Certification.

Read the assurances including the specific assurances for the Social Innovation Fund found near the end of this document. Once you have thoroughly read the assurances, click on the I Agree radio button. You will see authorized by, name, and authorized on, date, when the assurances are correctly authorized.

Next move to Certifications and click on View/print Certifications. Read the certifications. Once you have thoroughly read the certifications click on the I Agree radio button. You will see authorized certifying official, name, and

certified on, date, when the assurances are correctly certified. Now click on Verify This Grant Application.

If there are any errors in your application you will receive a message similar to what is listed below. Go back to each section and correct the issues. Click on Verify This Grant Application Again. This is the message you will receive when your application has no errors: No application errors were found. The application has verified without errors.

The last step is to click on submit grant application to CNCS. Once submitted you will receive this message: Thank you. You have successfully completed the action to submit grant application to CNCS on the date and the time. The status of your application is now submitted to CNCS.

And now we will open the line for questions. I want to also say that people should know that if the deadline is not met if you are late because of technical issues, you must have a ticket from the eGrants help desk to document that situation. Otherwise, your application, if not received by 5 o'clock PM Eastern Standard Time April 8, 2010, will be considered ineligible.

With that I'd like to open the call to questions.

Coordinator: Thank you. If you'd like to ask a question at this time please press star 1 on your touchtone phone. To withdraw your question please press star 2. And again for a question please press star 1. The first question is from (Angela Vancroft), your line is open.

(Angela Vancroft): Hi, I was trying to figure out how to get to the individual line items on the budget. And I'm a little confused so when you go to the narrative section you

click on budget and cost effectiveness and when I open that it's just a blank screen. How do I get to the area where I should put in the detailed budget?

Shelley Ryan: Sure, this is Shelley Ryan. You're actually going to click on - on the left hand side where it says Budget Section 1 or Budget Section 2 that's going to get you to those individual items that Marta just went through.

The part that you're talking about is in the narrative and that's where you're going to put your budget narrative information. That's separate from the individual dollars that you're going to enter.

(Angela Vancroft): Okay. Where do I get to the Budget Section 1 and 2 because that's not on the left hand side of my screen?

Shelley Ryan: Did you get - did you choose the Social Innovation Fund 2010 NOFA?

(Angela Vancroft): I did.

Shelley Ryan: Okay it should be when you look your - on the left hand side of your screen and it's actually on one of these PowerPoint - actually it's on several of the PowerPoint screen shots you should see Applicant Information, Application Information, Narrative, Budget Section 1, Budget Section 2, Document. Do you see that information there on the left hand side under where it says Welcome?

(Angela Vancroft): No I do not. My screen just has - it does not have any budget information on that left hand side. But I am in the NOFA 2010 and I have - I've registered and everything seems to be...

Shelley Ryan: And what about the Documents? Do you have a Documents screen or tab?

(Angela Vancroft): A Documents? I have Applicant Info, Narrative, Documents Review, Authorize and Submit.

Shelley Ryan: Okay. Yeah, it might be a good idea for you to contact the eGrants help desk for that.

(Angela Vancroft): Okay.

Shelley Ryan: Because they can get in and look at it live with you. So the number is 1-888-677-7849. And you should have your application ID and your organization's name on hand.

(Angela Vancroft): Okay.

Shelley Ryan: You can also send an email to egrantshelp@cns.gov. And they will work with you to make sure you're in the right competition and address - help troubleshoot any issues you're having there.

(Angela Vancroft): Okay, thank you.

Kelly Williams: Right on the - Kelly with the eGrants help desk. Do you have your application ID number?

(Angela Vancroft): Yes I do. And you're kind of hard to hear in the background.

Kelly Williams: Oh I'm sorry.

Shelley Ryan: Can you give us your application ID number please?

(Angela Vancroft): Yes it's 10SI114882.

Shelley Ryan: Say that again?

(Angela Vancroft): One zero S-I one one four eight eight two.

Kelly Williams: Okay. Once the meeting is adjourned and I get back to the help desk I will check into this and give you a call back. What was your name again ma'am?

(Angela Vancroft): (Angela Vancroft).

Kelly Williams: Okay I will check into this and give you a call back.

(Angela Vancroft): Thank you.

Marta Urquilla: Thank you.

Coordinator: The next question is from (Amy Hussle), your line is open.

(Amy Hussle): Hi, thank you. I had a question about the subgrantee section of the budget and you all had mentioned that you could include costs to cover the competitive subgrant process. And because of that it's creating a whole new question for me which is our model includes significant community planning time for the process.

And wondering if you all are considering that an eligible expense - actual planning dollars in the community, and if so would that need to be broken out separately than just a general subgrantee line item?

Marta Urquilla: So we can't make that determination for you. You need to propose your competition as you are going to run it and you need to have alignment between what you are proposing and the budget that's going along with it.

(Amy Hussle): Okay. Okay so just do it - don't break anything out separately. I just put that in and then just explain it in the narrative obviously?

Marta Urquilla: Yes, we will look for rationale between what you're describing as the proposed process and what you are showing as the proposed cost.

(Amy Hussle): Okay so planning dollars are eligible then but must be justified. Okay.

Coordinator: Thank you. The next question is from (Carolyn Mansfield), your line is open.

(Carolyn Mansfield): Hi, this is (Carolyn Mansfield) from Endeavor Group. I just have a quick question in terms of formatting. In the narrative section can we drop in footnotes or will those not be picked up?

Shelley Ryan: No they're not going to show up.

(Carolyn Mansfield): Okay.

Shelley Ryan: Again it's a documenting issue - or I mean a formatting issue.

(Carolyn Mansfield): And a follow-up and if we indentate like for paragraphs or even further maybe to address a significant point will that pick up but I assume it limits the character space is that correct?

Kelly Williams: Yes that's correct. Every space including tabs are counted towards the total character count for the narrative section.

(Carolyn Mansfield): Okay and the page limit guidance is just guidance, it's the characters that control is that correct?

Marta Urquilla: You should follow the character limits?

(Carolyn Mansfield): Yes okay, thank you.

Coordinator: Again if you do have a question please press star 1. Next question is from (Debra Mince), your line is open.

(Debra Mince): Hi. I just want to clarify there is a - there's a request to link documents. I believe they're evaluation documents? And I just want to clarify that what is being requested is a Web link to those documents which must be inserted into the text. This is apropos of your - of the restriction on uploading or linking any kind of actual documents. What you want us to do is to give you Web links to the required reports, correct?

Marta Urquilla: That is correct.

(Debra Mince): Okay thank you.

Coordinator: And I'm not showing any further questions.

Marta Urquilla: Okay. Well we would like to thank everyone for participating and thank you for your questions. On behalf of the Corporation we appreciate your interest in the Social Innovation Fund and we are so thankful for the work that you're doing in your communities and the effort that you've already put into your application.

Information on how to access the transcript and the audio recording from this call will be posted on our Website shortly. We encourage you to continue to visit the Website for updates. And we wish you all a good afternoon. Thank you so much.

Coordinator: That does conclude today's presentation. Thank you for joining and you may disconnect at this time.

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