



# New AmeriCorps Program Start-up Institute – January 27, 2015

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# Start-up Institute



## *Sessions Held in 2014:*

- Session 1 – July 23, 2014; Orientation to CNCS and Basic Financial Management
- Session 2 – August 20, 2014; AmeriCorps Member and Site Management; Financial Management Systems
- Session 3 – September 17, 2014; Program Start-up Grantee Panel

# Start-up Institute



## *Sessions Coming Up in 2015:*

- Session 4 – January 27, 2015; Grantee Reporting (progress and financial)
- Session 5 – February 19, 2015; AmeriCorps Member Evaluation and Support
- Session 6 – March 19, 2015; Monitoring Members and Sites
- Session 7 – June 25, 2015; Program Year Confluence (from 2014 to 2015)

# Today's Agenda



- Grantee Progress Reports: Sarah Yue
- Federal Financial Reports: Bonnie Janicki
- Closing Remarks

# CNCS AmeriCorps State and National

## **SARAH YUE, PROGRAM OFFICER**

Sarah Yue has six years of experience managing grants for AmeriCorps State and National, the National Science Foundation (NSF), and the National Oceanic and Atmospheric Administration (NOAA), where she has supported a number of new grantees during program start-up and management. She also spent 10 years teaching science at U.S. and international high schools.



# Progress Reporting Overview

- Purpose
- Terminology
- Due Dates and Logistics
- Content
- Interface
- Effective Reporting

# Why Progress Reports?

- Monitor individual grantee and subgrantee progress
- Track progress and accomplishments of AmeriCorps State and National portfolio
- Report to internal and external stakeholders

# Progress Reporting Terminology

- GPR: Grantee Progress Report
  - Report on programmatic progress
  - Distinct from the FFR (Federal Financial Report)
- Reporting Period: Period of time during which data are collected for a particular GPR
- Targets: Numbers included in the approved grant application
  - Numbers of MSYs and members
  - Performance measure outputs and outcomes
- Actuals: Numbers achieved during the reporting period

# Progress Report Due Dates

- Set by the AmeriCorps Grant Provisions:  
[https://egrants.cns.gov/provisions/RevisedFinal2014AmeriCorpsGrantProvisions\\_20141001.pdf](https://egrants.cns.gov/provisions/RevisedFinal2014AmeriCorpsGrantProvisions_20141001.pdf)
- May vary for different grant types
- Due dates may change from year to year
- GPR and FFR due dates are not necessarily the same

# Progress Report Due Dates

- For 2014 AmeriCorps National grants and State Service Commission grants:

Type of GPR	Due Date	Reporting Period
Mid-Year (semi-annual)	April 30	Start of grant year through March 31
End-of-Year (annual)	October 31	Start of grant year through end of grant year or September 30, whichever is sooner
Final	90 days after the end of the 3-year project period	Start of final grant year through end of final grant year

# Progress Report Due Dates

- State Service Commissions, tribes, and national grantees must set earlier due dates for their subgrantees/sites
  - Create subgrantee/site report template that allows for effective data collection and review
  - Allow enough time to review, clarify, and compile data from subgrantees/sites prior to CNCS reporting deadline

# Progress Report Logistics

- GPRs are submitted to CNCS via eGrants

Change Organization	Managing My Account	Reporting to CNCS
<p>Enter a grant number, application id, EIN, or org id and click on the "GO" button to view a different organization's information.</p> <input type="text"/> <input type="button" value="GO"/>	<p>Click on the links below to access common account functions.</p> <p><b>My Account</b> ➔</p> <p><b>Commission Input on National Applicants</b> ➔</p> <p><b>Commission Competitive Subapplication Ranking</b> ➔</p>	<p><b>Financial Report</b> ➔</p> <p><b>Progress Report</b> ➔</p> <p><b>Progress Report Supplement</b> ➔</p>
<p><b>Currently Viewing:</b> New York State Commission on National &amp; Community Service Rensselaer, NY</p>		

- CNCS Program Officers (POs) review and provide feedback in eGrants
- POs may request clarification responses before GPRs are finalized

# Progress Report Logistics

- Distinguishing between GPR types:

PROGRESS REPORT FOR EXISTING GRANTS					Welcome Sarah
Grant #13NDHMA002 - AmeriCorps National					
Reporting Date	Due Date	Extension Date	Status	PR Type	
07/01/2014 - 03/31/2015	04/30/2015		Progress Report Initial Entry	Progress Report Lite Semiannual	<a href="#">edit</a>
07/01/2013 - 09/30/2014	10/31/2014		Progress Report Reviewed	Progress Report Annual	<a href="#">view</a>
07/01/2013 - 03/31/2014	04/30/2014		Progress Report Reviewed	Progress Report Lite Semiannual	<a href="#">view</a>

- “Progress Report Lite Semiannual” = mid-year or final GPR
- “Progress Report Annual” = end-of-year GPR

# Progress Report Logistics

- Detailed GPR instructions and definitions of demographic indicators will be emailed to you prior to the GPR deadline
- Open grant amendments will interfere with GPR submission and review

# Progress Report Content

- Mid-Year GPR
  - Performance measure actuals
- End-of-Year GPR
  - Demographic indicators
  - MSY and member actuals
  - Performance indicators (enrollment, retention, 30-day enrollment and exit rates)
  - Performance measure actuals
  - Narratives
- Final GPR
  - Performance measure actuals

# Progress Report Content

- **Demographics - Required**
  - Number of individuals that applied to be AmeriCorps members
  - Number of volunteers recruited and/or managed by your programs
    - Episodic vs. ongoing volunteers

# Progress Report Content

- **Demographics – Optional**

- Number of AmeriCorps members who participated in disaster services projects
- Number of local disasters to which AmeriCorps members have responded
- Number of individuals affected by disaster receiving assistance from members
- Number of veterans serving as AmeriCorps members
- Number of veterans served
- Number of veteran family members served
- Number of military family members served
- Number of active duty military members served

# Progress Report Content

- **Demographics - School Turnaround Grantees**
  - Number of SIG schools
  - Number of priority schools
  - Number of urban schools
  - Number of rural schools
  - Number of elementary schools
  - Number of middle schools
  - Number of high schools
  - Number of English learners
  - Number of students with disabilities

# Progress Report Content

- **MSYs/Members**

- Number of actual MSYs allocated to each strategic plan objective
- Number of actual members providing interventions for each strategic plan objective
- Explanations are required for actuals that significantly differ from target values

# Progress Report Content

- **Performance Indicators**

- Data on enrollment, retention, and 30-day enrollment/exit are pulled from the Portal\*
- Explanations and corrective action plans are required for enrollment and retention rates below 100%

*\*Data are pulled into the GPR when the Performance Indicators tab of the GPR interface is first opened. Data do not refresh when tab is re-opened.*

# Progress Report Content

- **Performance Measures**

- National grantees and competitive subgrantees must report all performance measure actuals
- Formula subgrantees report National Performance Measure actuals only
- For National grantees and competitive subgrantees, explanations and corrective action plans are required for all unmet targets
- For all grantees/subgrantees, explanations are encouraged for actuals that exceed target values by 400% or more

# Progress Report Content

- **Narratives**

- Analysis of Impact (*REQUIRED*)
- Impact Snapshots (*OPTIONAL*)
- Member Experience (*REQUIRED*)
- Other: Training, Technical Assistance, Monitoring (*REQUIRED*)

# Progress Report Interface

[home](#)[back to eGrants](#)[my account](#)[help](#)[logout](#)

Grant Number: [REDACTED]

Application ID: [REDACTED]

Sponsor/Grantee: [REDACTED]

## eGRANTS Progress Report

[General Information](#)[Demographics](#)[MSYs/Members](#)[Performance Indicators](#)[Performance Measures](#)[Narratives](#)[Summary/Staff Review](#)

### Screen Instructions

Check the reporting period start and end dates, as well as the due date, to ensure you have selected the correct report. If you have not selected the correct report, click the "Cancel" button.

A summary table at the bottom of this tab allows you to see all past reports associated with your grant and to view or print a PDF version of these reports.

For additional information, refer to the GPR

### General Information

Grant # [REDACTED]  
Project Name [REDACTED]  
Grant Year 1  
Progress Report Type Progress Report Annual  
Amendment Number 2  
Reporting Period Start Date 07/01/2013  
Reporting Period End Date 09/30/2014  
Due Date 10/31/2014  
Extended Due Date  
# of Months Funded 15  
Status Progress Report Reviewed

[Cancel](#)[Continue Working](#)

	Reporting Period	Due Date	Ext. Due Date	Status	View Report (PDF)
1	07/01/2013 - 09/30/2014	10/31/2014		Progress Report Reviewed	<a href="#">PDF Link</a>
2	07/01/2013 - 03/31/2014	04/30/2014		Progress Report Reviewed	<a href="#">PDF Link</a>

# Progress Report Interface

General Information

Demographics

MSYs/Members

Performance Indicators

Performance Measures

Narratives

Summary/Staff Review

## Screen Instructions

Enter a numerical value in each field. If you do not collect data on an indicator, enter a zero (0) in that field.

Refer to GPR Instructions for details on which indicators are required.

If you wish to provide an explanation about data on this tab, click on the Grantee Narrative bar.

## Demographics

	Demographic Information	Value
1	Number of individuals who applied to be AmeriCorps members	<input type="text" value="315"/>
2	Number of volunteers recruited and/or managed by your programs.	<input type="text" value="52"/>
3	Number of AmeriCorps members who participated in disaster services projects	<input type="text" value="0"/>
4	Number of local disasters to which AmeriCorps members have responded	<input type="text" value="0"/>
5	Number of individuals affected by disaster receiving assistance from members	<input type="text" value="0"/>
6	Number of veterans serving as AmeriCorps members	<input type="text" value="0"/>
7	Number of veterans served	<input type="text" value="0"/>
8	Number of veteran family members served	<input type="text" value="0"/>
9	Number of military family members served	<input type="text" value="0"/>
10	Number of active duty military members served.	<input type="text" value="0"/>
11	Number of SIG schools (School Turnaround)	<input type="text" value="0"/>
12	Number of priority schools (School Turnaround)	<input type="text" value="0"/>
13	Number of urban schools (School Turnaround)	<input type="text" value="0"/>
14	Number of rural schools (School Turnaround)	<input type="text" value="0"/>
15	Number of elementary schools (School Turnaround)	<input type="text" value="0"/>

# Progress Report Interface

- General Information
- Demographics
- MSYs/Members**
- Performance Indicators
- Performance Measures
- Narratives
- Summary/Staff Review

## Screen Instructions

Please refer to the GPR instructions for additional information about how to count MSYs and members.

Once you have entered all numerical data, click the "Calculate MSYs/Members" button to populate the chart with the numerical and percentage differences between targets and actuals.

Enter explanations as outlined in the GPR instructions.

## MSYs/Members Information

Focus Area	Objective	MSY Target	MSY Actual	Difference	% of Target	Member Target	Member Actual	Difference	% of Target
Education	K-12 Success	50.00	* 49.50	-0.50	99.00%	50	* 53	3	106.00%
	Sub Total:	50.00	49.50	-0.50	99.00%	50	53	3	106.00%
	GRAND TOTAL:	50.00	49.50	-0.50	99.00%	50	53	3	106.00%

Done with Section

▶ Grantee Narrative

▶ Program Officer Analysis

▶ Program Officer Feedback

▶ Program Officer Clarification Items

▶ Grantee Clarification

Status

- Clarification Required
- Clarification Resolved
- Review Complete

# Progress Report Interface

- General Information
- Demographics
- MSYs/Members
- Performance Indicators**
- Performance Measures
- Narratives
- Summary/Staff Review

Screen Instructions

Data from the portal populates this tab the first time it is opened. The data does not refresh when the tab is reopened.

Enter explanations as directed in the GPR Instructions.

Performance Indicators Information

Use the horizontal scroll bar at the bottom of the page to review the chart in its entirety.

Organization	Program	Grant #	Enrollment Period	Enrollment Rate	Meets CNCS Expectations	Explanation
[REDACTED]	[REDACTED]	[REDACTED]	08/01/2013 07/31/2014	98.1	No	The timing of the 2013-20... <input type="text" value="Enter Explanation"/>

- ▶ [Grantee Narrative](#)
- ▶ [Program Officer Analysis](#)
- ▶ [Program Officer Feedback](#)
- ▶ [Program Officer Clarification Items](#)
- ▶ [Grantee Clarification](#)

Status

- Clarification Required
- Clarification Resolved
- Review Complete

# Progress Report Interface

- General Information
- Demographics
- MSYs/Members
- Performance Indicators
- Performance Measures**
- Narratives
- Summary/Staff Review

Screen Instructions

This tab contains an accordion panel for each performance measure. Click on a panel to enter performance measure data.

Enter numerical values and explanations as directed in the GPR Instructions.

Once data has been entered, click the "Calculate" button at the bottom of the page to calculate the numerical and percentage difference between each performance measure target and actual.

If you leave any fields blank, these fields will default to values of zero when you move to the next tab or save the report.

Performance Measure Progress

Use the horizontal scroll bar at the bottom of the page to review the chart in its entirety.

- Done with Section box checked
- Done with Section box not checked
- Clarification Required

[Redacted text]

Accelerating Student Achievement in Math Through Tutoring - K-12 Success - PM 1

Measure Type or Resource Type	Measure #	Target	Actual	Diff	% of Target	Met Target	Explanation / Corrective Action
Output	ED2	720	<input type="text" value="647"/>	-73	89.86 %	<input type="text" value="No"/>	Lower than anticipated <input type="text" value="Enter Explanation"/>
Outcome	ED5	640	<input type="text" value="257"/>	-383	40.16 %	<input type="text" value="No"/>	This past year, [Redacted] <input type="text" value="Enter Explanation"/>
MSYs		50.00	<input type="text" value="0.00"/>	-50.00	0.00 %		<input type="text" value="Enter Explanation"/>
Members		50	<input type="text" value="0"/>	-50	0.00 %		<input type="text" value="Enter Explanation"/>

Done with Section

# Progress Report Interface

- General Information
- Demographics
- MSYs/Members
- Performance Indicators
- Performance Measures
- Narratives**
- Summary/Staff Review

## Screen Instructions

Enter narratives as directed in the GPR Instructions.

Text must be entered in every narrative field before submitting the GPR. If you are not providing optional narratives please enter "NA."

## Narratives

In this section, open each narrative and describe your activities during the reporting period in more detail.

Narrative entered

Narrative not entered

* ? <input checked="" type="checkbox"/>	▶ Analysis of Impact
* ? <input checked="" type="checkbox"/>	▶ Impact Snapshots
* ? <input checked="" type="checkbox"/>	▶ Member Experience
* ? <input checked="" type="checkbox"/>	▶ Other-Narrative

▶ Program Officer Analysis
▶ Program Officer Feedback
▶ Program Officer Clarification Items
▶ Grantee Clarification

Status

- Clarification Required
- Clarification Resolved
- Review Complete

# Progress Report Interface

General Information

Demographics

MSYs/Members

Performance Indicators

Performance Measures

Narratives

Summary/Staff Review

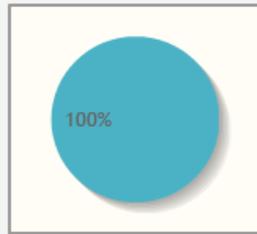
Screen Instructions

This tab provides a summary of data entered in previous tabs as well as printable reports.

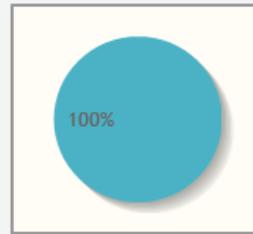
When all data has been entered into the GPR, click the "Grantee Submit to CNCS" to submit the GPR.

Summary Charts

Actual Vols by Focus Area



Actual Vols by Objective



Actual Target

Focus Area	Measures	
Education	<p>Measure: ED2 (PRIORITY) ED2: Number of students completing a CNCS-supported education program</p>	<p>Measure: ED5 (PRIORITY) ED5: Number of students with improved academic performance in literacy and/or math</p>

# Effective Progress Reporting

- ✓ Don't wait until the last minute to start working on your GPR
- ✓ Follow the specific directions for the particular report type and grant year
- ✓ Review and clarify data prior to submitting the GPR to CNCS
- ✓ Set internal deadlines that leave time for data review and clarification
- ✓ Ensure that reported values can be directly traced to source data

# Effective Progress Reporting

- ✓ Watch out for/proactively clarify red flags:
  - Numbers that are inconsistent with instructions and definitions
  - Outcomes that exceed outputs
  - Actuals that exactly duplicate the target values and/or consist solely of round numbers (1,000, 500, etc.)
  - Actuals that are much higher than target values (400% or higher)
  - Actuals that seem inconsistent with the number of members engaged in service
  - Numbers that are double-counted across more than one grant

# Resources for Progress Reporting

- 2014 AmeriCorps Grant Provisions:  
[https://egrants.cns.gov/provisions/RevisedFinal2014AmeriCorpsGrantProvisions\\_20141001.pdf](https://egrants.cns.gov/provisions/RevisedFinal2014AmeriCorpsGrantProvisions_20141001.pdf)
- Tutorial on Completing the GPR in eGrants:  
[http://www.nationalservice.gov/resources/american-corps/completing-american-corps-grantee-progress-report-gpr](http://www.nationalservice.gov/resources/americorps/completing-american-corps-grantee-progress-report-gpr)
- Online Courses on Data Collection and Instruments:  
<http://www.nationalservice.gov/resources/performance-measurement/training-resources#collection>
- e-Course on Demonstrating the Impact of Service:  
<http://www.nationalservice.gov/resources/american-corps/demonstrating-impact-service>

# Q&A



- What questions do you have?

# CNCS Office of Grants Management



## **BONNIE JANICKI, SENIOR GRANTS OFFICER**

Bonnie Janicki is a Senior Grants Officer for Grant Operations at the Corporation for National & Community Service, Office of Grants Management. Currently she manages a team of grants officers responsible for the day to day grants management of a diverse portfolio of programs that includes AmeriCorps State and National, Social Innovation Funds, Martin Luther King and many others. Bonnie began her federal service with the Corporation in 1994 and continues to enjoy her work.

# ASN Grantee Reporting



# Federal Financial Reports

# Session Objectives



1. Understand your role in preparing the Federal Financial Report
2. Review highlights of the Federal Financial Report
3. Describe common challenges faced by grantees with FFR submission
4. Answer your questions!

# What is the FFR?



- ✓ Federal Financial Report = FFR
- ✓ A consolidated Federal cash and Federal expenditure report
- ✓ Government-wide standard for reporting periods and due date
- ✓ Agencies determine which data elements to collect

***Fixed Amount Grants ≠ FFR***

# FFR Basics for CNCS Grantees

- Currently, grantees must submit 2 FFRs:
  - 1 → CNCS and 1 → HHS/PMS
  - The 2 reports must reconcile at closeout

# What is Collected on the FFR?

- 1 → HHS/PMS
  - Federal cash reported to the Payment Management System on a quarterly basis
  - Cash: receipts, disbursements, and on hand
- 1 → CNCS
  - Federal expenditures
  - Cash and in-kind match, and program income

# The AmeriCorps FFR



- The Serve America Act of 2009 requires grantees and subgrantees to report the amounts and sources of Federal funds used to carry out programs.
- AmeriCorps grantees are required to report all other Federal funds used as match:
  - Annually
  - Reported with the eGrants FFR expenditure data

# FFR Due Dates



- HHS/PMS FFR → Due 30 days after the calendar quarter ends
  - Final is due 90 days after grant ends
- CNCS FFR → Due dates are outlined in the terms and conditions of the grant award
  - Usually due semi-annually
  - Final is due 90 days after grant ends
- Grantees must submit all FFRs on time – or face penalties

# FFR Issues and Pitfalls

- Late Reporting
  - Deemed out of compliance
    - CNCS assessment tool
  - Potential sanctions
    - Funds placed on manual hold
    - Future funding at risk
- Accounting records do not support funds reported on the FFR

# Program Income Defined

- OMB defines program income as:
  - Gross income earned by the grantee that is directly generated by a grant supported activity
    - Includes: Income from fees for services performed
    - Does not include: Interest earned on advances of Federal funds
- Program income included as grantee share
- Excess program income recorded on FFR

Program income does **NOT** include  
→ revenue that is not a result of participant activities

# Program Income



- **Gross Program Income** – All funds collected as a direct result of grant funded-activities
- **Net Program Income** – The amount after deducting costs associated with generating the income
- **All Program Income** must be used for grant-related purposes
- **Program Income and the supporting documentation** is “auditable”

# Program Income



- There are 2 alternatives to using excess program income:
  - Additive – added to funds committed to the program and used to further program objectives
  - Deductive – deducted from total allowable costs of the program to determine the net allowable costs for which the Federal share is based
- Consult grant terms and conditions to determine deductive or additive alternative

# Program Income – Most Common Error

- ❑ Program Income used as match was erroneously reported as Program Income
  - *Corrective Action:* If all your program income was used as match, your Program Income line on the FFR should be blank.

Program Income:
l. Total Federal program income earned
m. Program income expended in accordance with the deduction alternative
n. Program income expended in accordance with the addition alternative
o. Unexpended program income (line l minus line m or line n)

# FFR Due Dates



## HHS/PMS FFR

Reporting Period	Due Date
1/1 – 3/31	4/30
4/1 – 6/30	7/30
7/1 – 9/30	10/30
10/1 – 12/31	1/31

## CNCS FFR

Reporting Period	Due Date
1/1 – 6/30	7/30
7/1 – 12/31	1/31
	Or
4/1 – 9/30	10/30
10/1 – 3/31	4/30

***Final due 90 days after grant ends  
and must reconcile***

# Q&A



- What questions do you have?

# Wrap Up for Today



- Resources at [www.nationalservice.gov](http://www.nationalservice.gov)
  - Grant Provisions
  - GPR Instructions
  - Financial Management Trainings
- Next Session: February 19, 3:00 – 4:30 pm Eastern;  
Member Evaluation and Support

# Thank You!

