

# AmeriCorps 2015

## Reviewer Orientation Note- Taking Guide

Corporation for National and Community  
Service

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## Introduction

Welcome AmeriCorps State and National Review Participants! We appreciate your interest and support for this year's AmeriCorps External Review process.

This guide is intended to support your orientation training for the 2015 AmeriCorps grant competition by providing a central location to take notes and record questions for the live Question & Answer session. You may use this guide for any or all Orientation Sessions by printing some or all of the document or entering notes and questions using a PDF reader.

There are six orientation sessions required for your participation:

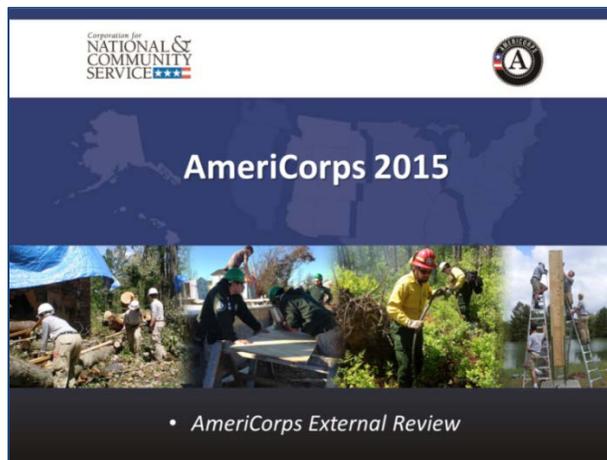
- Orientation I: AmeriCorps 101\*
- Orientation II: Problem/Need, Theory of Change, and Logic Model \*\*
- Orientation III: Member Training, Supervision, and Experience\*\*
- Orientation IV: Past Performance\*\*
- Orientation V: Ensuring an Equitable Review & Understanding the CNCS Grant Application Review Process
- Orientation VI: Reviewing the 2015 AmeriCorps Applications & Conducting the Review

*\*Required for all new AmeriCorps Review Participants. Optional for experienced Review Participants.*

*\*\*This session requires the Sample Application and blank IRF.*

## Reviewer Resource Webpage

All Orientation Sessions are available on the [FY 2015 AmeriCorps State & National Grant Competition Reviewer Resource Webpage](#). This page includes all forms and resources for the 2015 AmeriCorps grant competition and links to the PowerPoint presentations and WebEx recordings for all Orientation Sessions.



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## CNCS Focus Areas

- Disaster Services
  - Economic Opportunity
  - Education
  - Environmental Stewardship
  - Healthy Futures
  - Veterans and Military Families
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## AmeriCorps Terms and Concepts

**Grantee:** The direct recipient of the grant funds.

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**Multi-state:** Operating in two or more states. This program receives an AmeriCorps grant directly from CNCS.

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**Single-state:** Operating solely within one state.

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**State Service Commission:** Comprised of a board nominated and appointed by a state’s governor who oversees the implementation of national/community service and volunteer initiatives in their state.

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**Subgrantee:** The local organizations which receive the grand funds from the Grantee to implement the grant activities on the local level.

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**Operating Sites and Service Locations:** Terms used to describe the place where a member conducts the service activities.

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## AmeriCorps Members

- Enrolled for a specific term of service.
- Not volunteers or employees.
- May receive a living allowance, health insurance, and child care assistance.
- Receive the Segal AmeriCorps Education Award upon successfully completing a term of service.
- Subject to criminal history checks.

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## AmeriCorps Member Terminology

### Member Service Year

One Member Service Year is equivalent to one full-time AmeriCorps member (not always equivalent to one person—see slot type below). AmeriCorps funds are contingent on the number of MSYs requested by the program.

### Member Term/Slot Type

There are five types of AmeriCorps member terms or slots: full time, half time, reduced half time, quarter time, and minimum time. (i.e., two members with half-time slots can comprise one MSY.) The total MSYs a program requests depends on the number and type of slots/AmeriCorps member positions included in a particular program design.

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## State and National Grants

- Applicants propose an AmeriCorps program.
- An application includes a program design, organizational capability, cost effectiveness and adequacy, a detailed budget, performance measures, and/or additional documents.
- As an External Reviewer, you will assess the Program Design and some aspects of past performance.

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## AmeriCorps Program Design

- Design/structure of AmeriCorps programs vary.
  - May address a single Focus Area or multiple Focus Areas.
  - Members can serve in a variety of ways.
  - No one right way to design an AmeriCorps program.
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## Categories of Funding

### AmeriCorps State Grants

- Address needs within one state.
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### National Direct Grants

- Address needs in a multi-state area.
  - Grantee has relationships with entities in different states that will operate the local programs.
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### Education Award Programs (EAP) Fixed Amount Grants

- Funded directly by CNCS or through State Commissions.
  - Organizations must raise additional revenue required to operate the program.
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### Professional Corps Grants

- Grants are awarded to organizations that propose to operate a Professional Corps program in a single or multiple states.
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## US Territories and Indian Tribe Grants

- Indian Tribes Program
  - A minimum of 1% of funds for AmeriCorps programs is set aside for Tribal applicants.
  - Indian Tribes can also submit applications for any of the other grant programs.
- States and Territories w/out Commissions
  - Applicants from these locations can apply directly to CNCS.

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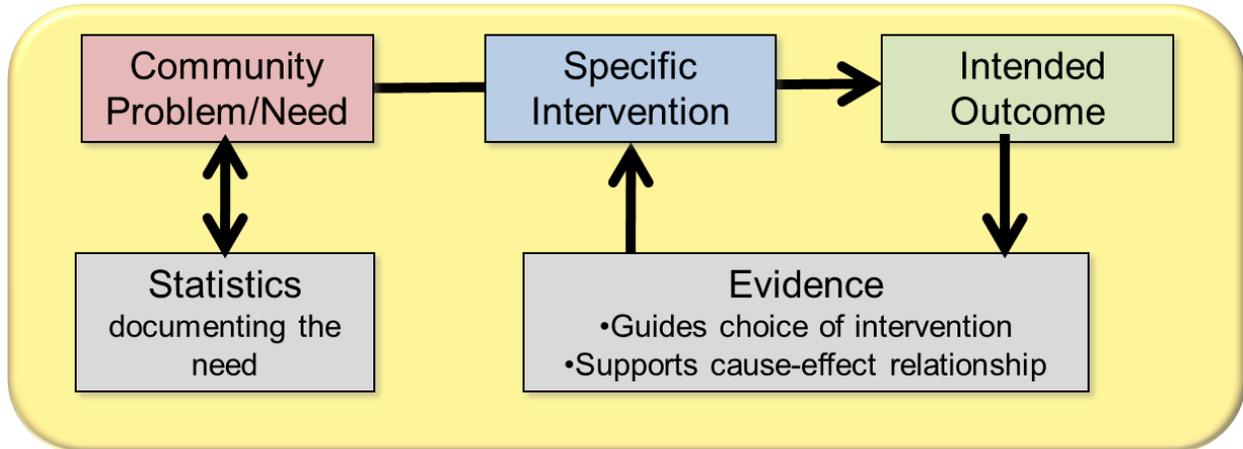
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## Orientation II: Problem/Need, Theory of Change, and Logic Model

### Problem/Need and Theory of Change



*Diagram of Theory of Change Elements*

- Cause and effect relationship between a community problem or need, a program’s intervention, and the desired outcomes

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- Supported by data and evidence
- Data used to show extent and severity of need in target community

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- Characteristics of effective data

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- Data needs to make a compelling case

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- Evidence backs up the effectiveness of the proposed intervention

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- Examples of evidence and characteristics of strong evidence

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- Stronger the evidence, more confidence in causal relationship between intervention and outcome

### Example: Riverton Literacy Corp.

Example of Theory of Change and how it is backed up by data and evidence

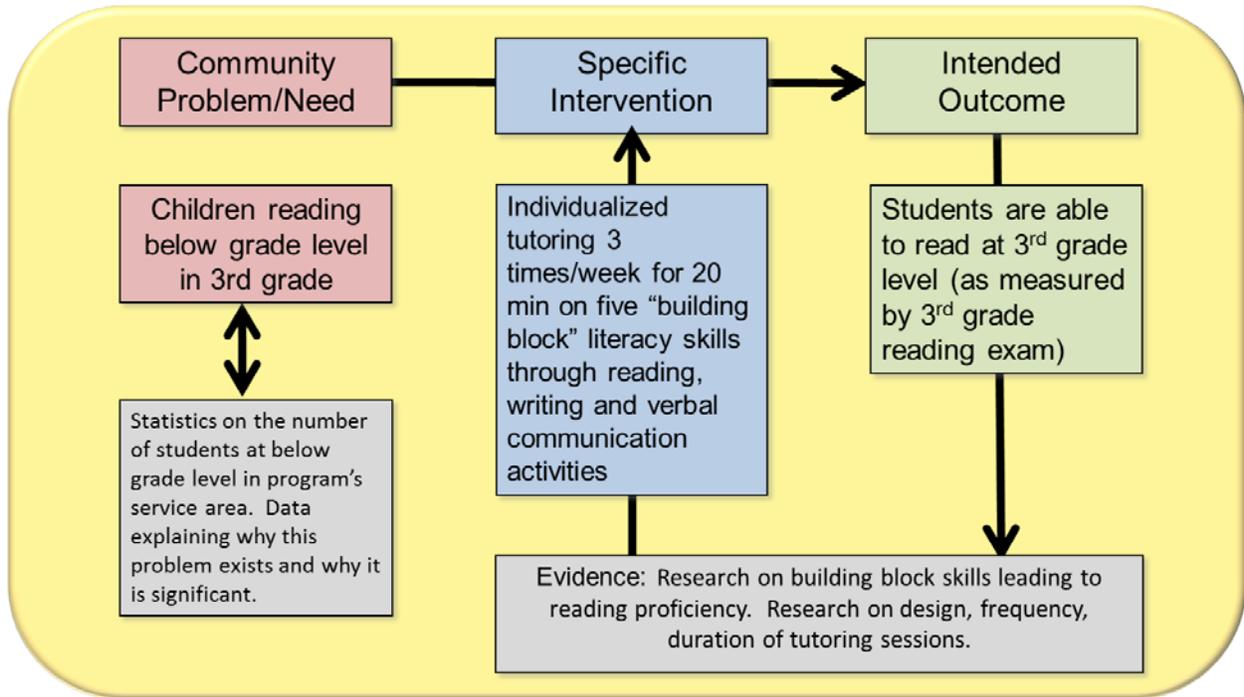


Diagram of Theory of Change for Riverton Literacy Corp.

### Problem Identified in Community

Children are reading below grade level by the time they reach the 3<sup>rd</sup> grade.

- Evidence used or that would ideally be used to back up this problem

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- Important that the intervention proposed fits the underlying causes of the problem

**Intended Outcome**

More students will be reading at grade level by the 3<sup>rd</sup> grade.

- Description of proposed intervention

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- Evidence supporting proposed intervention

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- Important for applicant to describe cited research studies in some detail

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**How does this example meet CNCS’s expectations for an application?**

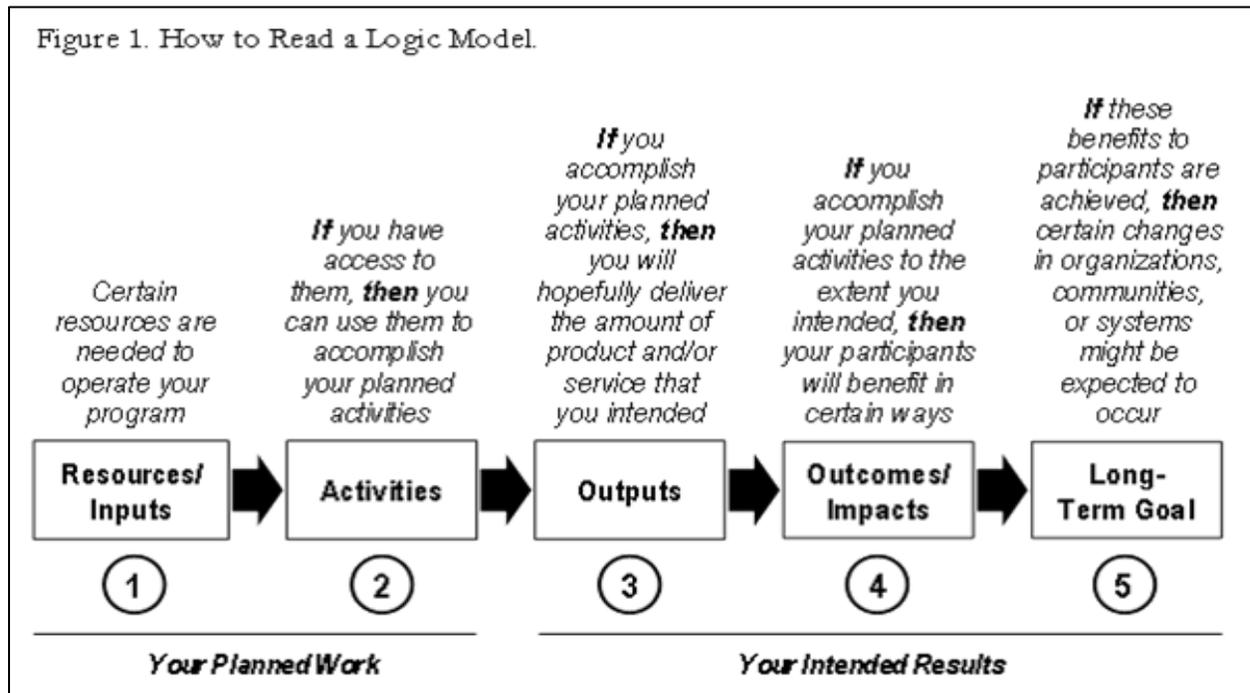
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## Logic Model

- A visual way of depicting the program’s Theory of Change
  - The community problem/need that exists
  - Resources available to operate the program
  - Planned activities (interventions)
  - Outcomes the program intends to achieve
- Should have a logical “flow” from left to right
- Should tell a coherent story about what the program will do and what it plans to accomplish



Example of How to Read a Logic Model (Kellogg Foundation)

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## CNCS Template for a Logic Model

All applicants must use this template in creating a logic model.

PROBLEM	INPUTS	ACTIVITIES	OUTPUTS	OUTCOMES Short-Term	OUTCOMES Medium-Term	OUTCOMES Long-Term
The community problem that the program activities (interventions) are designed to address.	Resources that are necessary to deliver the program activities (interventions), including the number of locations/sites and number/type of AmeriCorps members.	The core activities that define the intervention or program model that members will implement or deliver, including duration, dosage and target population.	Direct products from program activities.	Changes in knowledge, skills, attitudes and opinions. These outcomes, if applicable to the program design, will almost always be measurable during the grant year.	Changes in behavior or action. Depending on program design, these outcomes may or may not be measurable during the grant year.	Changes in condition or status in life. Depending on program design, these outcomes may or may not be measurable during the grant year. Some programs, such as environmental or capacity-building programs, may measure changes in condition over a period as short as one year.

### Problem

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### Inputs

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### Activities

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### Outputs

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### Outcomes (Short-Term)

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**Outcomes (Medium-Term)**

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**Outcomes (Long-Term)**

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- Programs are not required to have all three types of outcomes.
  - Not all outcomes need to be measurable during the grant period or directly connected to performance measures.
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- It's OK if outcomes are in the "wrong" boxes as long as the elements are logically aligned.
  - One type of outcome is not "better" than other types (i.e., long term outcomes are not necessarily more valuable than short-term ones, and changes in condition are not inherently better than changes in behavior).
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**Expectations for High-Quality Applicants**

- Strong Theory of Change with logical alignment between problem/need, intervention, and outcome.
  - Clearly articulated problem/need backed up by specific, relevant, current data.
  - High-quality intervention supported by solid evidence showing that it is likely to achieve meaningful outcomes.
  - AmeriCorps member service that provides a significant "value-add" in addressing the problem/need.
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**Problem/Need**

- The applicant clearly describes how the community problem/need will be addressed by the program.
- The applicant clearly describes how the community problem/need is prevalent and severe in communities where members will serve and the need has been well documented with relevant data.

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**Theory of Change and Logic Model**

- The applicant clearly describes the proposed intervention including the roles of AmeriCorps members and (if applicable) the roles of leveraged volunteers.
- The applicant clearly describes how the intervention is likely to lead to the outcomes identified in the applicant’s theory of change.
- The applicant clearly describes how the AmeriCorps members will produce significant and unique contributions to existing efforts to address the stated problem.
- All elements of the logic model are logically aligned.

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## Logistics for Review

- Sections of the application that should be reviewed to assess the criteria:
    - Problem/Need narrative
    - Theory of Change and Logic Model narrative
    - Logic Model chart (located at end of application)
    - Evidence Base narrative
  - You do not need to read or consider the Performance Measures section of the application.
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- Level of evidence will be assessed outside of external review, but the Evidence Base section should still be read and considered in addressing the review criteria
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- 3-page limit for logic model; do not review beyond this point
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- Information in logic model chart and narrative is complementary; details do not have to be repeated both places, but should not contradict each other
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## Scoring Rubric

- 4-point scale\*:
  - Exceeds the criterion
  - Meets the criterion
  - Partially meets the criterion
  - Does not meet the criterion

*\* One criterion (“All elements of the logic model are logically aligned”) will be assessed on a three-point scale without an “Exceeds the criterion” option.*

- Refer to the Scoring Rubric document on the Reviewer Resource Webpage to read an overview of each rating.

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- The Reviewer Resource Webpage contains a chart that lists specific descriptions of the “Exceeds the criterion” and “Does not meet the criterion” ratings for each individual review criterion.
- The “Meets the criterion” and “Partially meets the criterion” ratings will fall between these two extremes.
- Please use both reference documents (the Scoring Rubric and the Criterion Descriptions) throughout your review process.

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**Practice: Sample Application**

- Open the Sample Application (located on the Reviewer Resource Webpage).
- Read the Problem/Need narrative, Theory of Change and Logic Model narrative, Evidence Base narrative, and Logic Model chart.
- Using the Scoring Rubric and Criterion Descriptions, score the Problem/Need and Theory of Change and Logic Model criteria for the Sample Application (you can record your scores on a blank IRF).
- Write down your justification for each score.
- Use the space provided here to take notes, draft a response for each criterion, or record questions for the live Question & Answer session.

**Problem/Need Criterion 1**

**Criterion:** The applicant clearly describes how the community problem/need will be addressed by the program.

**Justification**

*Strengths*

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*Weaknesses*

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*As Compared to CNCS Evaluation*

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**Problem/Need Criterion 2**

**Criterion:** The applicant clearly describes how the community need/problem is prevalent and severe in communities where members will serve and the need has been well documented with relevant data.

**Justification**

*Strengths*

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*Weaknesses*

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*As Compared to CNCS Evaluation*

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**Theory of Change and Logic Model Criterion 1**

**Criterion:** The applicant clearly describes the proposed intervention including the roles of AmeriCorps members and (if applicable) the roles of leveraged volunteers.

**Justification**

*Strengths*

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*Weaknesses*

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*As Compared to CNCS Evaluation*

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### Theory of Change and Logic Model Criterion 2

**Criterion:** The applicant clearly describes how the intervention is likely to lead to the outcomes identified in the applicant’s theory of change.

**Justification**

*Strengths*

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*Weaknesses*

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*As Compared to CNCS Evaluation*

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### Theory of Change and Logic Model Criterion 3

**Criterion:** The applicant clearly describes how the AmeriCorps members will produce significant and unique contributions to existing efforts to address the stated problem.

**Justification**

***Strengths***

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***Weaknesses***

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***As Compared to CNCS Evaluation***

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**Theory of Change and Logic Model Criterion 4**

**Criterion:** All elements of the logic model are logically aligned.

*[Note: this criterion is scored on a three-point scale.]*

**Justification**

***Strengths***

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***Weaknesses***

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***As Compared to CNCS Evaluation***

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## **Orientation III: Member Training, Supervision, and Experience**

### **Expectations for High-Quality Applications**

#### **Member Training**

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#### **Member Supervisors**

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#### **Member Service Experience**

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#### **Recruitment of Members**

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## Review Criteria for External Review

### Member Training

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### Member Supervisors

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### Member Service Experience

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## Logistics for Review

- Review applicable sections of the application:
  - Member Training
  - Member Supervision
  - Member Experience
- Read but do not assess the Notice Priority and Commitment to AmeriCorps Identification.

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## Scoring Rubric

- 4-point scale:
  - Exceeds the criterion
  - Meets the criterion
  - Partially meets the criterion
  - Does not meet the criterion

- Refer to the Scoring Rubric document on the Reviewer Resource Webpage to read an overview of each rating.

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- The Reviewer Resource Webpage contains a chart that lists specific descriptions of the “Exceeds the criterion” and “Does not meet the criterion” ratings for each individual review criterion.
- The “Meets the criterion” and “Partially meets the criterion” ratings will fall between these two extremes.
- Please use both reference documents (the Scoring Rubric and the Criterion Descriptions) throughout your review process.

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**Practice: Sample Application**

- Open the Sample Application (located on the Reviewer Resource Webpage).
- Read the Member Training, Member Supervision, and Member Experience narratives.
- Using the Scoring Rubric and Criterion Descriptions, score the Member Training, Member Supervision, and Member Experience criteria for the Sample Application (you can record your scores on a blank IRF).
- Write down your justification for each score.
- Use the space provided here to take notes, draft a response for each criterion, or record questions for the live Question & Answer session.

**Member Training Criterion 1**

**Criterion:** The applicant clearly describes how members will receive high quality training to provide effective service.

**Justification**

*Strengths*

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*Weaknesses*

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*As Compared to CNCS Evaluation*

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**Member Training Criterion 2**

**Criterion:** The applicant clearly describes how members and volunteers will be aware of, and will adhere to, the rules including prohibited activities.

**Justification**

*Strengths*

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*Weaknesses*

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*As Compared to CNCS Evaluation*

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*Prohibited Activities*

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**Member Supervision Criterion 1**

**Criterion:** The applicant clearly describes how members will receive high quality guidance and support from their supervisor to provide effective service.

**Justification**

*Strengths*

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*Weaknesses*

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*As Compared to CNCS Evaluation*

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**Member Supervision Criterion 2**

**Criterion:** The applicant clearly describes how supervisors will be adequately trained/prepared to follow AmeriCorps and program regulations, priorities, and expectations.

**Justification**

*Strengths*

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*Weaknesses*

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*As Compared to CNCS Evaluation*

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**Member Experience Criterion 1**

**Criterion:** AmeriCorps members will gain skills and experience as a result of their training and service that can be utilized and will be valued by future employers after their service term is completed.

**Justification**

*Strengths*

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*Weaknesses*

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*As Compared to CNCS Evaluation*

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**Member Experience Criterion 2**

**Criterion:** The applicant clearly describes how AmeriCorps members will have access to meaningful service experiences and opportunities for reflection.

**Justification**

*Strengths*

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*Weaknesses*

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*As Compared to CNCS Evaluation*

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### Member Experience Criterion 3

**Criterion:** The applicant clearly describes how AmeriCorps members will have opportunities to establish connections with each other and the broader National Service network to build esprit de corps.

#### Justification

##### *Strengths*

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##### *Weaknesses*

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##### *As Compared to CNCS Evaluation*

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**Member Experience Criterion 4**

**Criterion:** The applicant clearly describes how AmeriCorps members will develop an ethic of and skills for active and productive citizenship and will be encouraged to continue to engage in public and community service after their AmeriCorps term.

**Justification**

*Strengths*

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*Weaknesses*

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*As Compared to CNCS Evaluation*

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**Member Experience Criterion 5**

**Criterion:** The applicant clearly describes how the program will recruit AmeriCorps members from the communities in which the programs operate.

**Justification**

*Strengths*

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*Weaknesses*

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*As Compared to CNCS Evaluation*

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## Orientation IV: Past Performance

### Expectations for High-Quality Applications

#### Applicants with Previous Experience

- Have been successful in meeting their performance measure targets (both outputs and outcomes) during the last three years of program operations

OR

- Have made adjustments to their program design and/or implementation to help them achieve their targets more effectively (if did not fully meet performance measure targets)

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#### Review Criterion for External Review

**Criterion\***: The applicant clearly describes how it has met performance measurement targets during the last three years of program operations, or, if not, has an adequate corrective action plan in place.

*\*This is not the only review criterion in the Notice of Funding Opportunity related to Past Performance; however, it is the only criterion that will be assessed during external review.*

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### Logistics for Review

- Past Performance is located in the Organizational Capability section of the application.
  - The Past Performance section also addresses criteria related to enrollment, retention, and compliance issues or areas of weakness/risk.
  - You should read the entire section, but you do not need to assess these criteria.
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- Do not read or rate the other sections under Organizational Capability:
    - Organizational Background and Staffing
    - Compliance and Accountability
    - Performance Measures
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- You may consider performance measure information provided in the Evidence Base section of the application.
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### New Applicants

- Were not required to respond to the Past Performance criteria.
  - You do not need to make a determination about whether a program is new or not.
  - If the applicant does not discuss Past Performance, simply indicate this by selecting the appropriate choice on the review form.
  - Do not provide comments on Past Performance.
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### Scoring Rubric

- 4 rating choices:
  - Met all performance measurement targets
  - Did not meet all performance measurement targets, but has an adequate corrective action plan
  - Did not meet all performance measurement targets; corrective action plan is inadequate or not present
  - Did not provide a response

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- The Reviewer Resource Webpage contains a chart that lists specific descriptions for each of these four rating choices.
- Please use the Criterion Descriptions when assessing Past Performance.
- Do not use the Scoring Rubric for the Past Performance criterion.
- Only assess the last full year of program operations, not the full three years.

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### Practice: Sample Application

- Open the Sample Application (located on the Reviewer Resource Webpage).
- Read the Past Performance narrative.
- Using the Criterion Descriptions, rate the Past Performance criterion for the Sample Application (you can record your scores on a blank IRF).
- Write down your justification for the rating.
- Use the space provided here to take notes, draft a response for the criterion, or record questions for the live Question & Answer session.

**Past Performance Criterion 1**

**Criterion:** The applicant clearly describes how it has met performance measurement targets during the last three years of program operations, or, if not, has an adequate corrective action plan in place.

**Justification**

*Strengths*

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*Weaknesses*

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*As Compared to CNCS Evaluation*

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## Orientation V: Ensuring an Equitable Review & Understanding the CNCS Grant Application Review Process

### Ensuring an Equitable Review

#### What Does It Mean to Be Equitable?

- Ensuring that each application receives consideration through a fair and impartial process that preserves the transparency and integrity of the grant application review
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- Understanding the Selection Criteria
    - Assessing each criterion and applying the appropriate rating
    - Balancing the value of your expertise, professional opinion
    - Appreciating the variety and diversity of programs
    - Understanding and following the Review (Scoring) Rubric
    - Using only the materials provided; not considering outside information
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- Shared responsibility as a Review Participant
    - Confidentiality, Conflicts of Interest, Bias
    - Understanding and following page limits
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#### Conflict of Interest (COI)

- Any private interest, affiliation, or relationship which could potentially compromise your ability to impartially carry out your official responsibilities.
- You must tell CNCS about any possible Conflicts of Interest or even the appearance of a Conflict of Interest.
- The duty to disclose potential Conflicts of Interest is an ongoing duty.
- If a Conflict of Interest or the appearance of a Conflict of Interest arises during the course of your participation, you must tell CNCS.

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**Examples of Conflicts of Interest**

- Affiliation with an applicant organization
  - Includes Continuing Applications (in 2nd or 3rd year of funding cycle)
  - Includes State Commissions

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**Importance of Reporting COIs**

- Ensure a fair and equitable review for each application
- Preserving the integrity of the External Review process
- If you have any questions or think a conflict may exist, immediately contact your Panel Coordinator and GARP Liaison
- CNCS staff will review the information, make a determination as to whether there is a conflict, and notify you of what steps, if any, need to be taken.

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**Understanding Potential Bias**

- What is bias?
  - A preference or inclination that may inhibit impartial judgment
  - Can be for or against – positive or negative
- Examples of potential bias can include:
  - Comments about the proposed methods or models in the Program Design that have no basis
  - Favor or dislike of the author or applicant
  - Consideration of outside information
- How should instances of bias be handled?
  - Often will be flagged by another panel member

- Return to assessment; only use information provided in the application
- Exercise consideration and respect – remove emotions
- Possible recusal from review of that application

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**Confidential Information**

**Applicant Confidentiality**

- Applicant names
- Applicant business information and financial data
- Details about the proposed program
- Review comments and review ratings

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**Participant Confidentiality**

- Identity of all Review Participants
- The link between Reviewers and their comments

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**Proper Handling of Confidential Items**

- All review notes
- Review artifacts
- All applications

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**Confidentiality and COI Form: Process and Purpose**

- Read the Confidentiality and COI Form
  - Sign and return to CNCS
  - Receive the applications
  - Review for potential COIs
  - Maintain appropriate confidentiality
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**Diversity in Programs**

- Focus areas
  - Types of organizations
  - Scope of proposed project/ program size
  - Program model
  - Target population
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**Narrative Page Limit**

**Page Limit Includes**

- SF-424 Face Sheet
- Executive Summary
- Program Design
- Organizational Capability
- Cost Effectiveness and Budget Adequacy

**Page Limit Does Not Include**

- Logic Model
- Budget
- Performance Measures
- Evaluation Plan
- Additional Documents

CNCS reviews the page limits for all application narratives prior to the review.

Applications are flagged, and Reviewers must not read beyond the 15 page limit (18 page limit for Multi-Focus Intermediaries).

If you have a narrative that exceeds the page limit and it was not flagged, please report it to your Panel Coordinator and GARP Liaison immediately.

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## Understanding the CNCS Grant Application Review Process

### Background on CNCS

- Created in 1993, and expanded opportunities for Americans to serve their communities through national service
  - Nation’s largest grant-maker supporting service and volunteering
  - Engages millions of Americans of all ages and backgrounds in service each year through its programs
  - Promotes United We Serve: [www.serve.gov](http://www.serve.gov)
  - For more information, please review the CNCS Strategic plan: <http://go.usa.gov/Z6eF>
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### Life-Cycle of Competitive Grants



### External Review Process

- Review trainings and orientations sessions
- Download assigned applications
- Review applications for COI.
- Assess applications
  - Read the application
  - Provide a rating for each External Review criterion.
  - Comment on significant strengths and weaknesses
  - Panel Coordinator reviews Individual Reviewer Form (IRF) and provides feedback
- Participate in Panel Discussion Calls
  - Reviewer revises IRF and incorporates PC feedback
- Review of IRF by Program Officer Liaison (POL)
- Submit final IRFs
- Complete the closeout process

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### Role & Responsibilities: Review Participants

#### External Reviewer

- Conducts assessments of and provides ratings for each application
- Participates in Panel Discussion Calls
- Completes high-quality IRFs
- Incorporates Panel Coordinator (PC) feedback to improve IRF
- Three (3) Reviewers on each panel

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**Panel Coordinator**

- Manages panel logistics and facilitates the Panel Discussion Calls
  - Provides feedback to each Reviewer on every IRF
  - Completes Panel Coordinator Notes for each application after the Panel Discussion Call
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**Grant Application Review Process (GARP) Liaison**

- Primary contact for process-related guidance and logistical support
  - Checks with each Reviewer and PC to assist on review progress
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**Program Officer Liaison (POL)**

- Provides CNCS programmatic expertise and guidance
  - Available as a resource for clarification of Selection Criteria
  - Reviews the IRFs to ensure comments relate to Selection Criteria
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**Key Review Forms**

**Individual Reviewer Form (IRF)**

- Captures the External Reviewers’ assessments and the significant strengths and weaknesses identified in an application
  - Completed by External Reviewers for each application
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### Panel Coordinator (PC) Notes

- Completed after every Panel Discussion Call for each application
  - Provides an opportunity to capture noteworthy discussion, points of (dis)agreement, panel anomalies, and potential bias
  - Captures any issues that were not considered in the Panel Discussion Call that CNCS staff should be aware of when considering this application
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### eGrants

- You will access eGrants at two junctures in the Review:
    - Download applications
    - Enter banking information for honorarium
  - To access eGrants: <https://egrants.cns.gov/espan/main/login.jsp>
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### Expectations of Review Participants

- Review all orientation and training materials
    - 2015 AmeriCorps External Review Handbook
    - Orientation Sessions
    - Notice of Federal Funding Opportunity (Notice or NOFO)
  - Report any actual or potential COIs and comply with confidentiality expectations
  - Produce high-quality review products
  - Be responsive to requests from the GARP Liaison and POL
  - Satisfactorily complete all Review Participant responsibilities
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## Orientation VI: Reviewing the 2015 AmeriCorps Applications & Conducting the Review

### Key Changes from Last Year

#### What Does It Mean to Be Equitable?

- Using an Excel-based electronic Individual Review Form (IRF)
  - There are no separate Standards
  - Criterion Descriptions document
  - Less forms – Applicant Feedback Summary and Justification of Evidence Level & Quality Form were eliminated
  - Reviewers should not consider any aspect of the Performance Measures
  - Reviewers should only rate, not comment on, Past Performance
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### Expectations and Steps

- Ensure your participation is verified.
  - Become familiar with materials
  - Receive Panel Assignment email
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### Review Preparation

- Review all orientation and training materials.
- Review, initial, sign, and submit the Confidentiality & Conflict of Interest Form and Participation Agreement as instructed.
- Familiarize yourself with review tools and resources.
- Receive Panel Assignment email.
- Review each application for COI – contact CNCS if anything is identified.

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**Review Preparation: Dates**

- The following is due on Monday, February 2nd – one day prior to the review launch
  - Return Administrative Forms
  - Participation in the Live Q&A Call
- Review dates: February 3 – 17<sup>th</sup>

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**Steps to Complete an IRF**

- 1) Reviewer individually reads and assesses application.
- 2) Reviewer completes an IRF and sends to PC for feedback.
- 3) Engage in Panel Discussion Call.
- 4) Reviewer returns to IRF to revise.
- 5) Reviewer sends 2<sup>nd</sup> draft IRF to PC.
- 6) PC reviews 2<sup>nd</sup> draft IRF, and advances to POL if it meets “near final” requirements.
- 7) POL reviews and provides feedback on IRF as necessary.
- 8) PC ensures that Reviewer incorporates feedback to finalize IRF.

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### Reviewing the Applications

- Applications generally will be reviewed and discussed in groups.
  - Order will be determined by the Panel Assignment email.
- Read the full application (within the 15 or 18 page limit).
  - Applications should be assessed against the Selection Criteria, not other applications or outside information.
  - Apply your experience and expertise with balance.
- Use the IRF to complete your assessment of the application.

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### Rating the Applications

- As you rate each application, keep these nearby:
  - Review (Scoring) Rubric
  - Criterion Descriptions
  - Be familiar with the 4-point rating scale

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### Panel Discussion Calls

- Panel Discussion Call for each application
- Purpose of the Panel Discussion Calls
- Serving as an Effective Panel Member

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### Keep in Mind

Please remember that not every organization has the resources to hire an experienced grant-writer. Applications should be assessed based upon how the narrative addresses the Selection Criteria; not how well the narrative was written.

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### Significant Strengths & Weaknesses

- A strength becomes significant when it shows that the applicant has clearly demonstrated both an understanding of and the ability to address a key issue in program implementation or management.
  - A weakness becomes significant when a criterion is not addressed at all or is addressed poorly, causing concern about the applicant’s ability to successfully implement the proposed project.
  - Do not focus on generating a particular number of comments or on providing a comment for every criterion. The quality of the comments is much more important than the quantity.
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- Incorporate the application’s significant strengths and weaknesses in the appropriate feedback boxes
  - Not every section of the IRF requires comments, but all comment boxes should receive a response
  - Each Strength/Weakness should be written on separate lines, not paragraph form, and in complete sentences
  - Do not use any bullets, symbols, (+), (=), or (+/-) indicators
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## Tips for Producing High-Quality IRFs

- Address only the Selection Criteria.
  - Address only the information found within the application.
  - Do not address: budget, suggestions for improvement, the Performance Measures, what “the panel thinks” etc.
  - Do not copy and paste/restate the application.
  - Avoid making references to page numbers.
  - Avoid making generic comments that can be applied to “any” application.
  - Use language that is evaluative, grammatically correct, and does not include inflammatory remarks.
  - Reference the **Reviewer Tips: Writing Meaningful Comments & Sentence Starters**.
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## Expectations for Closeout

- Documents are labeled, verified, clean
  - Confirm requirements are met with PC and GARP Liaison
  - Complete Evaluations
  - Confirmation received of approval for Honorarium
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## Honorarium

- Banking information entered into eGrants.
  - Current federal employees are not eligible to receive payment.
  - If you are indebted to the Federal government for any delinquencies (any debts that are 90 days or older i.e. Child Support, Federal Taxes, and defaulting on a Federal Loan, etc.).
    - Partial or full garnishment of that debt may be automatically deducted from your Honorarium payment by the Department of Treasury.
    - This is not controlled or requested by CNCS, and is an action of the Treasury Department when payments are processed.
  - You should expect a 1099 to arrive in January 2016 that you will need to use for tax-filing purposes.
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