

## Appendix B – Formula Funding Process – 2021-2022

**Definitions:** New programs are defined as programs that have not received AmeriCorps funding through Serve Wisconsin in the past three years. All other programs are considered Existing. New programs will not have performance data for consideration.

In order to be eligible for Formula funding through the Board, an applicant shall be one of the following at the time of application for Formula funds: Wisconsin state or local government entity, or one of the following if its governing body operates within the state of Wisconsin: a federally recognized Indian tribe, a public or private nonprofit organization (organized as a tax-exempt entity under the federal IRS Code, including religious organizations and labor organizations), or an institution of higher education as defined in Wisconsin Statute 118.55(1). The only exception to this policy would be for an annual Formula process in which all other possible Formula funding options have been considered and Formula funding remains unallocated. In cases where Formula funds would otherwise remain unallocated, those funds could be provided to an entity that does not meet the requirements of this policy.

Minimum performance score of 80% of total points possible is required. Reaching the 80% minimum shall be inclusive of rounding to two places after the decimal point; therefore, a performance scoring percentage of 79.50% or above shall be considered to have met the 80% or above requirement. An application for a program that has a performance score of less than 80% of total points possible shall not be eligible for Formula funding, unless the Board decides to waive the 80% requirement based on evidence of a corrective action plan to include benchmarks and associated milestones. An exception to the 80% minimum shall apply to applicants proposing a new and not previously funded AmeriCorps project, and shall apply for the first three years the new-not previously funded project is funded. The exception for such new projects shall not preclude use of other criteria to determine appropriateness of funding such new projects.

Formula funding will be determined by considering the following criteria:

### Existing Programs

- Performance criteria (up to 3 years of data may be considered, if available)
  - Enrollment Rate
  - Retention Rate
  - 30-day exit compliance
  - Performance Measures - Percent of Target Achieved
  - Timely reporting
- Fit in Wisconsin's Formula Portfolio, including but not limited to:
  - Program Location
  - Program Focus
  - Cost Efficiency
  - Staff Capacity
  - Public or Private non-profit registered in Wisconsin
- Average Application Scores will be presented; however, a ranking by Average Application Scores alone will not be presented for Existing programs

### New Programs

- Average Application Score
- Fit in Wisconsin's Formula Portfolio, including but not limited to:
  - Program Location
  - Program Focus
  - Cost Efficiency
  - Staff Capacity
  - Public or Private non-profit registered in Wisconsin

### Additionally for Existing and New Programs

- The ranking of organizations that are approximately equal will be affected by:
  1. Youth Corps priority: The Board's interpretation is that, if two applicants are approximately equal in performance, the youth corps program would be given priority.

2. Compliance issues: Depending on the severity and status of the compliance issue(s), this may cause an organization to be ranked lower than another. When considering compliance, the Board may take into consideration program/member attendance at statewide member events.
- Consideration may be given to the application's stated number of leveraged volunteers per MSY.
  - Formula funding criteria will generally be used to make supplemental Formula funding decisions.
  - In accordance with 45 CFR § 2522.475, the following will be considered:
    - ❖ The innovative aspects of the national service program, and the feasibility of replicating the program.
    - ❖ The sustainability of the national service program.
    - ❖ The quality of the leadership of the national service program, the past performance of the program, and the extent to which the program builds on existing programs.
    - ❖ The extent to which participants of the national service program are recruited from among residents of the communities in which projects are to be conducted, and the extent to which participants and community residents are involved in the design, leadership, and operation of the program.
    - ❖ The extent to which projects would be conducted in one of the areas listed in §2522.450(c)(1) through (5).
      - 2522.450(c) Programs supporting distressed communities: Programs or projects that will be conducted in:
        - (1) A community designated as an empowerment zone or redevelopment area, targeted for social economic incentives, or otherwise identifiable as having high concentrations of low-income people;
        - (2) An area that is environmentally distressed, as demonstrated by Federal and State data;
        - (3) An area adversely affected by Federal actions related to managing Federal lands that result in significant regional job losses and economic dislocation;
        - (4) An area adversely affected by reductions in defense spending or the closure or realignment of military installation;
        - (5) An area that has an unemployment rate greater than the national average unemployment for the most recent 12 months for which State or Federal data are available.

### Continuation Formula Funding

Currently funded Formula programs (for the 2020-2021 program year) may choose to apply for up to two additional years of Continuation Formula funding, for a maximum of three consecutive years of Formula funding, and are required to apply for Competitive funding for the year following the third year of Formula funding. Formula funded grantees are not required to apply for second and third year Continuation Formula funding and can choose to apply for Competitive funding instead of applying for a second or third year of Continuation Formula funding.

### Other Considerations

When Formula funding requests exceed Formula funding resources, applicants submitting a request for a grant amount totaling 20 multiplied by the Wisconsin State Maximum Cost per MSY, or greater, may have their award amount considered at the level of 20 multiplied by the Wisconsin State Maximum Cost per MSY. The Board shall have discretion to increase or decrease the total amount awarded to an applicant based on availability of allocable funds and other considerations.

Applications requesting a funding level greater than the cap amount and with performance scoring percentage of 98% or greater may be considered for funding above the cap up to the lesser of their requested amount for 2021-2022 or their awarded amount for 2020-2021; expansions are excluded.

Option to recommend a Formula application be considered as a Planning Grant: After reviewing an eligible proposal, Serve Wisconsin staff may recommend to the Board that an application, regardless of peer review and the performance scoring evaluation, be considered as a Planning Grant application if staff determines that the organization needs more time to prepare to operate a successful AmeriCorps program.