



## **Executive Summary**

**TITLE:** Iowa Commission on Volunteer Service

**LEAD APPLICANT:** Iowa Commission on Volunteer Service (Des Moines)

**CONSORTIUM MEMBERS** of the North Central Region include the State Service Commissions-- hereafter referred to as "commissions"--of Illinois (Springfield), Indiana (Indianapolis), Iowa (Des Moines), Michigan (Lansing), Minnesota (Minneapolis), Nebraska (Lincoln), North Dakota (Bismarck), Ohio (Columbus), South Dakota (Vermillion), and Wisconsin (Madison). The consortium also includes America's Service Commissions (ASC, Washington, D.C.) and is further comprised of stakeholders representing AmeriCorps State/National and Senior Corps programs. **PROPOSED ACTIVITIES:** The Iowa Commission on Volunteer Service (ICVS) offers this proposal as the lead applicant of the North Central Region to facilitate the planning, implementation, and financial oversight of the 2013 North Central National Service Convention (NCNSC). ICVS, in collaboration with ASC (the national association of the 53 commissions), proposes a multi-day regional conference for AmeriCorps State/National, Senior Corps, and commission program staff.

The NCNSC's structure will include tracks specific to these stakeholders, collaborative sessions to facilitate cross-stream training and dialogue, and a virtual component to accommodate participants unable to travel. Trainings will focus on the Corporation for National and Community Service's (CNCS) competencies in performance measures/evaluation, compliance for grants administration, program/financial management, and other topics vital to effective program impact. This proposal is supported by the RSVP Association, the National Service Inclusion Project, and several national training and technical assistance providers.

**FUNDING REQUESTED:** The amount of funding requested is \$50,000.

## **Program Design**

**APPLICANT INFORMATION:** The Iowa Commission on Volunteer Service (ICVS) has been in operation since 1978. ICVS and the consortium commissions provide routine training, technical assistance, and monitoring for national service programs. Thus, each entity has a breadth of knowledge and experience regarding the learning intervention strategies required for high-impact national service programs.

**REGION PROPOSED:** The proposed service region aligns with CNCS' recommendation for the North Central region listed in the Notice of Funding Opportunity. These 10 states include IA, IL, IN, MI, MN, ND, NE, OH, SD, and WI. Executive leaders from the consortium met prior to the

development of this proposal to indicate their support of ICVS to serve as the lead applicant for this opportunity, and agreed to encourage their programs to attend the NCNSC.

**APPLICANT EXPERIENCE:** ICVS is the ideal recipient and steward of these funds. In 2012 ICVS, in partnership with ASC, designed and implemented the NCNSC; a pilot model which closely reflects the criteria outlined in the NOFA. The 2012 NCNSC was hosted in Dubuque (a city bordering the states of IA, IL, and WI) from August 6-8. The conference brought together 160 national service stakeholders representing 16 states. The conference's agenda is attached as a supplementary document.

A planning committee representing eight states in and around the North Central region determined the focus of the learning opportunities and trainings. Four concurrent workshop tracks were offered for AmeriCorps Program Directors, Volunteer Generation Fund/RSVP Senior Corps Directors, and commissions--each tailored to the most critical needs of participants and designed to explore the most innovative practices in national service. Where possible, commission staff with subject matter expertise served as trainers, including staff from ASC, IA, IL, IN, MI, MO, NE, and WI. Highly regarded national service subject matter experts were also contracted to disseminate their expertise including Sue Hyatt: Owner of Core Thought, Inc. (performance measurement data collection/theory of change), Mike Kenefick: Independent Consultant and former Director of Grants at CNCS (financial/grants management), Kaira Esgate: Director of Reimagining Service (innovations in service), Bill Hulterstrom: CEO of United Way of Utah County (volunteer management) and Paul Schmitz: CEO of Public Allies (collective impact).

Evaluations indicated that 88.4% of respondent's expectations were met or exceeded, 89.8% described the convention as a valuable investment of their time, and 93.8% agreed that their learning experience was supported by the trainers and conference staff. Anecdotal feedback indicated intent to apply learning: "I know more about...how to enforce rules surrounding prohibited activities", "(I) am bettered prepared to develop performance measures," and "(I) learned...about AmeriCorps evaluation and best practices in member management."

The NCNSC is intended to be a replicable training model for other regions to apply and adapt in continued partnership with ASC. The common leadership of ASC allows for consistency of conference development, alignment of curricula, and continuous improvement among all regional conferences--allowing for an excellent conference experience for participants nationwide. Each conference will be similar in structure and content to allow for prospective attendees to select their preferred date, location, and total cost. The following commissions have been designated as lead applicants in their

regions: Iowa, Tennessee, Colorado, and New Jersey. In the Pacific Region, the Oregon Commission intends to create its own training model that reflects the consistent elements presented at the other ASC/lead applicant's regional conferences.

**SELECTION OF HOST CITY AND FACILITY:** ICVS/ASC proposes to host the conference at a location in the outer suburbs of Chicago, Illinois; a unanimous decision of the consortium. The location is close to the region's geographic center, and provides access to direct ground transportation and a hub of affordable airfare. ICVS/ASC staff will research the facilities recommended by the Illinois commission, and contact local Convention & Visitors Bureaus to review other options. Facilities will be assessed on their capacity to host a multi-day conference for a minimum of 200 persons disbursed among 4-6 breakout sessions at any given time, as well as their capacity to be fully accessible for persons with disabilities. Facilities must be capable of providing lodging and meals at the federal government per diem rate.

**OUTREACH, MARKETING, AND ENGAGEMENT:** ASC will promote the 2013 NCNSC to CNCS Area Managers, State Officers, the Senior Corps Associations, and commissions. ICVS/ASC will create and publish a proposed agenda, trainer credentials, and registration information by June 2013. Marketing materials will be posted on ASC's and ICVS' web sites, social media (Facebook, Twitter, LinkedIn), and e-news subscriptions. ICVS will request that the NCNSC information be posted on CNCS' web site. Materials will contain a statement that alternative formats are available upon request, and requests will be honored promptly. Regional branding will be created for use on conference materials in addition to CNCS branding required by the cooperative agreement. Each commission in the consortium will be responsible for forwarding marketing materials to their key stakeholders.

The minimum target enrollment for the NCNSC is 200 participants: 80 AmeriCorps State and National program staff; 80 RSVP, Foster Grandparent, and Senior Companion program staff; 20 commission staff; and 20 other invited service stakeholders.

**CONFERENCE DESIGN METHODOLOGY:** ICVS/ASC will co-facilitate an inclusive planning process to advise the development of the conference. A committee will be formed that represents the 10 states in the region and includes delegates from AmeriCorps State/National, Senior Corps, CNCS State Offices, commissions, and ASC staff. The committee will meet regularly upon CNCS' notice of intent to award a cooperative agreement to ICVS. The committee will determine the theme, agenda design, and learning modules of the 2013 NCNSC.

The NCNSC will be 2-3 days in length, with the potential for half days of conference content on

either end to allow for travel flexibility. Each day will begin with a plenary session, followed by a series of tailored breakout sessions, and conclude with a large group reflection, networking activity, or service project. Opportunities for specific stakeholder groups to host independent meetings, orientations, and trainings may be offered pre or post conference upon request.

The NCNSC, along with the four other lead commission applicants, will use technology to allow virtual participation at reduced rate. Select workshops will be internet-streamed through a vendor like Livestream, Adobe Connect, or GoTo Training. Each conference will offer different tracks of workshops online, to allow participants to receive all the available content that would be offered at a single conference, but in manageable increments for effective e-learning.

The following tracks of learning will be offered at the conference: AmeriCorps State and National, Senior Corps, and commissions. Required trainings for CNCS competencies regarding performance measure data collection, applying evidence-based theories of change, program evaluation, and grants/financial management will be offered and featured prominently on the agenda.

Including the topics listed above, ICVS/ASC will serve the most common and critical needs of the national service programs in the region. Needs will be identified through analysis of commissions' and CNCS State Offices' needs assessments, summaries of recent trainings, and/or feedback. Analysis of this information will ensure that learning priorities are aligned throughout the region, and allow for appropriate design of the agenda's structure, emphasis, and flow to attain maximum educational impact.

The commissions of Michigan and Iowa designed a national service program staff core competency tool (submitted as a supplementary document) that assesses program risk, intensity of monitoring required, and learning need. The tool describes the professional competencies (site management, community engagement, member human resources, etc.) that national service program staff must possess in order to be successful. The tool itemizes a continuum of performance indicators for staff who are struggling, emerging, strong, or exemplary. Although the tool is utilized more often for AmeriCorps staff, most elements are applicable competencies for Senior Corps staff. ICVS will use this tool to supplement and corroborate the needs analysis process, identify opportunities for learning interventions, and inform the training design.

The consortium's initial ideas for plenary session topics include: AmeriCorps NCCC's regional activities, United Way Worldwide affiliates and volunteer centers, and/or innovative practices in cross-stream collaboration. Potential breakout sessions include member

recruitment/engagement/retention strategies, disability inclusion, Veterans/military families, service as a strategy to support disconnected youth, disaster services and response, and focus area-specific topics (education, health, environment, etc.).

Wherever possible, ICVS/ASC will utilize peer trainers in order to tap into the subject matter expertise available in the field. Peer trainers may be identified by the committee, CNCS State Office staff, and programs. National training and technical assistance providers will likely be sought for their expertise and facilitation, particularly for the required CNCS topics of performance measures and grant/financial compliance. State of Iowa rules will require that an open Request for Proposals process be used for all contracted trainers. ICVS/ASC will ensure that preferred national trainers receive a copy of the Request. CNCS senior leadership will also be invited and requested as potential keynote presenters.

Post conference, all learning materials and curricula (slides, handouts, recordings, etc.) will be delivered to the National Service Knowledge Network for online cataloging and ongoing reference.

**OUTPUTS, EVALUATION, AND KNOWLEDGE GAINS:** ICVS/ASC will work with CNCS to adopt the required assessments of gains in competency for performance measures and compliance. The assessment will be administered pre and post conference as instructed by CNCS. Additionally, it is standard practice for ICVS to conduct an on-line post conference evaluation (via Survey Monkey) that measures participant satisfaction, knowledge gains, and ability to apply new learning. Assessment data, including participant profiles and conference outputs, will be delivered to CNCS within 30 days of the conclusion of the conference. Evaluation results will be shared in a systematic way among awarded commission lead applicants to provide recommendations for continuous improvement. ICVS proposes to pilot a mid-year evaluation that captures how participants have applied knowledge gains from the conference over time and to what effect. Cases of particular success would be identified and analyzed in order to improve future trainings.

**TIMELINE:** The consortium agreed that August is a strategic month to convene. CNCS will announce the competition results by May 29. This timeline allows for two months of preparation. This is the same timeline that the 2012 NCNSC operated on, and experience has proven that it is reasonable. The benchmarks for this timeframe are itemized as follows: May 29, 2013: Announcement/negotiation/approval of cooperative agreement; June 2013: Regional planning committee meets regularly, facility contract executed, trainers secured, and marketing materials developed; July 2013: Registration system opens and logistics coordination continues; Early August 2013: Registration deadline; Between August 11 - 31: NCNSC presented; Two weeks after event:

Learning materials submitted; 30 days after: Outputs and evaluation data returned (if aligned with CNCS requirements); 90 days after: Financials reconciled/reported to CNCS; Six months after: Mid-year evaluation sent, collected, and analyzed.

**HUMAN RESOURCE CAPACITY AND ROLES:** ICVS will serve as the point of contact with CNCS and submit all required materials. ICVS will manage the budget and allowable costs, secure conference facility, and print materials. ICVS will co-facilitate the planning committee with ASC. The planning committee will advise conference development, secure trainers, and assist with promotion. ICVS will respond to all requests for reasonable accommodations and ensure accessibility is fully realized.

ASC will manage the conference registration system, which will contain prominent messaging for persons with disabilities to request reasonable accommodations. ASC will market the conference to their network and provide continuous support to the lead duties of ICVS. ASC will communicate successes and cautions of other awarded commission lead applicant's conferences to those that have yet to convene. The Executive Directors of ASC and ICVS will attempt to secure cash and/or in-kind sponsorships to increase revenue.

**RATIONALE FOR APPROACH:** ICVS/ASC's rationale for this approach is based on experience. The intent is to replicate the most successful elements of the 2012 NCNSC and enhance the conference by adding attendance via technology, reduced registration fees, workshops for Senior Corps staff, and increasing overall capacity.

### **Organizational Capability**

**DEMONSTRATED SUCCESS AND EXPERIENCE:** ICVS/ASC initiated, developed, and implemented the conference model which inspired this Notice of Funding Opportunity, and are eager to improve upon the model in the coming months with the support of CNCS.

ICVS has been a leader in the national service program development and training field for many years. ICVS has proactively sought to address the needs of AmeriCorps State/National and Senior Corps in all of its training and educational opportunities. ICVS has a history of initiating training and conference partnerships with neighboring commissions. Some examples in recent years include: Serve Midlands Inclusion Conference (w/NE, '13), NCNSC (w/ASC, '12), Empowerment Mini-Conference (w/IL & WI, '12), Iowa Non Profit Summit ('10, '11, '12, attended by all families of national service), and AmeriCorps Program Director Retreat ('09, '10, '11).

Since its founding in 1997, ASC has routinely convened national and regional conferences for commissions and national service programs. These conferences include: Commissioner Institute

('08), Volunteer Generation Fund Grantee Meeting ('10, '11, '12), Commission Leadership Summit ('11, '12, '13), and NCNSC (with ICVS, '12).

These examples demonstrate that ICVS and ASC are accustomed to routinely presenting education opportunities with large audiences, multiple tracks of learning, and often multiple days in length. Further, ICVS has a wealth of experience in the design and facilitation of personalized and targeted learning interventions for smaller cohorts of AmeriCorps, Senior Corps, and other service programs. The topics of these trainings have included financial management, grant compliance, performance measurement, theory of change, and methods of data collection that empirically demonstrate impact.

ICVS maintains five Program Officers who provide routine technical assistance regarding the selection, systems development, and reporting of CNCS performance measures. ICVS staff received training from leading experts in CNCS performance measures including Sue Hyatt/Core Thought, JBS International, and Jim Stone/CNCS. Performance measures improvement is a regular agenda item at ICVS program director orientations, trainings, and conferences. More than 30 national service programs representing all focus areas have received performance measure training and technical assistance from ICVS staff in recent years.

**EXPERTISE OF KEY STAFF:** ICVS intends to contract with ASC to maximize the capacity to design and achieve an excellent conference. Qualifications of the key staff from ASC and ICVS assigned to the NCNSC are as follows:

ASC's Director of Programming and Training, Christy Venable, has 9 years of experience working with national service programs and commissions. She has organized and supported several national and regional conferences for service programs and commissions including the 2009 North Central, 2010 Southwest, and the 2012 North Central National Service Conventions.

Rachel Manuel Bruns is a shared staff member between ASC (manager of resource development for commissions) and ICVS (technical assistance provider to volunteer centers), and will be physically placed at ICVS. Rachel's leadership roles have included the Director of Volunteer Wisconsin and Iowa Campus Compact. She has served on conference planning teams for the Milwaukee Reimagining Service (2012) and Wisconsin Volunteer Coordinator's Association (2013).

ICVS Training Coordinator, Sarah Hinzman, has more than five years of experience in event management and adult education, concentrating in training design and facilitation. Sarah will receive her M.S. in this study in 2013. She served as the local lead project manager for the 2012 NCNSC. She is the subject matter expert among the ICVS staff for disability inclusion.

This team will lead the regional planning committee, create media and marketing, coordinate the local conference logistics including facility/meals/lodging, communicate and contract with selected trainers, coordinate virtual participation, and evaluate knowledge gains.

**SYSTEMS, STRUCTURE, AND STAFFING:** Collectively, ICVS staff has 65 years of experience in national service, program administration, and event management. All core staff is experienced in the grant requirements and developmental needs of AmeriCorps and Senior Corps programs, and many are subject matter experts (i.e. disaster services, youth mentoring, disability inclusion, etc.) with the ability to train at NCNSC. ICVS staff regularly collaborates with national service program managers, the NCCC campus, and the CNCS Office in Iowa.

Project managers will be supported and supervised by their respective Executive Directors. Christy Venable will be supervised by Tom Branen. Rachel Bruns and Sarah Hinzman will be supervised by Adam Lounsbury. Christy, Rachel, and Sarah have been professional associates for three years, and are in regular contact with one another.

**FISCAL OVERSIGHT:** ICVS is a department within the State Government of Iowa. ICVS has managed the following federal grants since 1993: AmeriCorps, Admin/PDAT/Disability, Learn and Serve Community Based, and the American Recovery and Reinvestment Act. The Iowa Economic Development Authority (IEDA) serves as the fiscal agent for ICVS.

IEDA adheres to the Generally Accepted Accounting Principles, undergoes regular financial reviews, and is audited annually by the Auditor of State. As a state agency, IEDA/ICVS has sound fiscal, program, and personnel policies that are reviewed and updated on a regular basis. Expenditures and revenues are tracked and allocated appropriately in the state's financial management system. IEDA provides fiscal oversight to many federal programs, representing approximately \$500 million in federal funds. In partnership with IEDA, ICVS will ensure fiscal oversight and compliance with federal requirements.

IEDA will review and approve the cooperative agreement with CNCS and the subsequent contracts with ASC, facility, and trainers. IEDA will also supervise the execution of each contract's scope of work and financial reconciliation.

ASC's portion of financials to be contracted with ICVS will be administered by the Oklahoma Community Services Commission, who serves as ASC's standard accounting provider.

**PROJECT MANAGERS:** The project management duties of conference coordination and training design will be designated among the core team that includes Christy Venable (ASC), Rachel Manuel Bruns (ICVS/ASC), and Sarah Hinzman (ICVS).

## **Cost Effectiveness and Budget Adequacy**

**REASONABLE COST FACTORS:** The registration fee proposed is \$150 for persons residing within 100 miles of the conference location, and \$75 for persons residing beyond 100 miles. The rationale for the reduced rate is to offer a built in "scholarship" to offset travel costs. The proposed registration fees are more reasonable than the 2012 NCNSC, where fees were between \$150 and \$200 depending on origin. Registration for virtual conference attendees is not expected to exceed more than \$35/person. Reasonable expenses factored into the fee include meeting room rental, five meals, lodging, live-streaming technology, trainers' fees and travel, and ICVS/ASC conference personnel travel.

The primary expenses of the NCNSC covered by the cooperative agreement are designated to provide a portion of salary for each project manager. The project managers will designate a major percentage of their time to the planning and execution of the NCNSC for 2-3 months.

Any revenue beyond local registration fees will be acquired through sponsorships yet to be determined. The Executive Directors of ICVS, ASC, and the conference host state will be tasked with the acquisition of cash or in-kind sponsorships. ICVS estimates that nearly \$8,000 of in-kind resources (including supplies, subscriptions, and personnel) will be applied.

**SUFFICIENCY OF BUDGET:** The budget proposed is sufficient to provide the participants with an excellent conference and effective learning experience. The current budget of ICVS is \$5,393,143 and the cooperative agreement would represent <1% of the total budget. The \$50,000 requested will allow for enhancements to the 2013 NCNSC including live-streamed workshops, more participants at a lower registration cost, and increased capacity of the project management team. These enhanced outputs are expected to increase the overall learning outcomes for participants.

**SUFFICIENCY OF FINANCIAL OVERSIGHT:** IEDA Division Administrator Terry Roberson (33 yrs. experience) and IEDA Accountant Katie Caggiano (12 yrs. experience) will conduct financial oversight. Expenditures and revenues are tracked and allocated appropriately in the state's financial management system. IDEA/ICVS has a strong record of securing and properly managing public funds. ICVS has been subject to several financial reviews, including a full-scope audit by CNCS that was resolved in 2006. This audit revealed no major findings and resulted in disallowed costs of less than .1%, which ranks ICVS among the highest performing commissions for financial management.

## **Clarification Summary**

N/A.

## Required Documents

Document Name

Status