

# Narratives

## Executive Summary

The Connecticut Commission on Community Service (CCCS) offers this proposal as the lead applicant of the Atlantic Cluster Region. The Atlantic Cluster of states includes Connecticut, Delaware, the District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Puerto Rico, Rhode Island, the U.S. Virgin Islands and Vermont. This consortium of member states, in collaboration with America's Service Commission (ASC) will facilitate the planning, implementation, and financial oversight of the 2015 Atlantic Cluster Regional Training Conference (2015 ACRTC). As the Corporation's largest regional cluster, the Atlantic Cluster boasts 693 AmeriCorps projects, 237 Senior Corps projects, 63 Social Innovation Fund projects and 8 Volunteer Generation Fund projects. In order to fulfill on the President's request to expand national service, State Commissions and national service programs must be equipped to provide excellent program innovation, implementation, and regulation. This can only be achieved with efficient, effective and affordable trainings offered to State Commissions and key stakeholders. The CCCS, with ASC, proposes a multi-day regional conference for AmeriCorps State and National programs, Senior Corps projects and other key CNCS national service programs. The 2015 ACRTC will plan a regional training conference that ensures all participants are better able to engage more Americans in results-driven service, share improved impact data, and build an enriched knowledge of compliance competencies. The amount of funding requested is \$50,000.

## Program Design

### LEAD APPLICANT:

The Connecticut Commission on Community Service (CCCS) Consortium members of the Atlantic Cluster Region include the State Service Commissions of Connecticut, Delaware, the District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Puerto Rico, Rhode Island, the U.S. Virgin Islands and Vermont. The consortium also includes ASC and is further comprised of stakeholders representing AmeriCorps and National, Senior Corps projects and other key CNCS national service programs.

### PROPOSED ACTIVITIES:

As the Corporation's largest regional cluster, the Atlantic Cluster boasts 693 AmeriCorps projects, 237 Senior Corps projects, 63 Social Innovation Fund projects and 8 Volunteer Generation Fund projects. In order to fulfill on the President's request to expand national service, State Commissions and national service programs must be equipped to provide excellent program innovation,

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implementation, and regulation. This can only be achieved with efficient, effective and affordable trainings offered to State Commissions and key stakeholders. Each state's service delivery mechanism must have clear performance measures, meticulous compliance, and guaranteed fiscal and administrative management. The CCCS, in collaboration with America's Service Commissions (ASC), proposes a multi-day regional conference for AmeriCorps State and National programs, Senior Corps projects and other key CNCS national service programs. The 2015 ACRTC will plan a regional training conference that ensures all participants are better able to engage more Americans in results-driven service, share improved impact data, and build an enriched knowledge of compliance competencies. The training conference will include tracks specific to the stakeholders, collaborative sessions to facilitate cross-stream dialogue and a virtual component to accommodate participants unable to travel.

### APPLICANT INFORMATION:

The Connecticut Commission on Community Service (CCCS) began operation in 1993. The CCCS, along with the other cluster commissions, has a long history of providing training, technical assistance, outreach and monitoring for national service programs. Leveraging the vast experience of each commission, the 2015 ACRTC is well poised to successfully deliver this training opportunity.

### REGION PROPOSED:

The proposed service region aligns with CNCS's geographic allocation for the Atlantic Cluster as listed in the Announcement of Federal Funding Availability. These 14 states, district and territories include CT, DC, DE, MA, ME, MD, NH, NJ, NY, PA, PR, USVI and VT. In a survey conducted within the Atlantic Cluster, Connecticut and New Hampshire offered to host the 2015 ACRTC. Connecticut is applying as the Lead State and New Hampshire will Co-Host the conference with the support of all the other members of the Atlantic Cluster Region.

APPLICANT EXPERIENCE: For more than a dozen years, the Connecticut Commission on Community Service had planned, hosted and sponsored the Connecticut Conference on Volunteerism. As an annual event, the conference planning involved leaders from various volunteer sectors - state commissioners, volunteer center leaders, faith-based leaders, corporate volunteers and educators. The conference drew more than 500 participants from across the state and the neighboring states of New York, Rhode Island and Massachusetts. The commission served as the financial steward, the registrar and the evaluation team for the conference. In addition, the Atlantic Cluster is the birth region of hosting region-wide training. Its first conferences were held in the mid-1990s (Burlington, VT; Saratoga Springs, New York; Princeton, New Jersey; Providence, Rhode Island). This unique

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convening sprouted from Executive Directors who determined it would be beneficial for area states to come together, share resources, best practices and lessons learned. Our last official convening was scheduled in North Conway, New Hampshire for September 10-12, 2001 but ended abruptly due to the tragedies of September 11, 2001. With the new application opportunity of a Training and Technical Assistance & Regional Training Conference grant, the intent moving forward is to replicate a successful standard of regional conferences, in collaboration with our trade association & ASC. The Atlantic Region has a wealth of expertise already at the table, and will design a spectacular conference with enviable efficiencies. ASC will provide continuity and assistance in adapting specificity as needed by each region. The following commissions have been designated as lead applicants in their regions: Florida, Michigan, Texas and Utah.

### **SELECTION OF HOST CITY AND FACILITY:**

The CCCS proposes to host the conference at a location in downtown Hartford, Connecticut. The location is close to the region's geographic center with easy access to direct ground transportation (train or highway) and affordable airfare into Bradley International Airport (BDL). Preliminary findings indicate there are area hotels that can accommodate 300+ participants at a multi-day conference and upwards of a dozen breakout rooms for workshops. The facility selected will be fully accessible for persons with disabilities and also accommodate a virtual training experience.

### **OUTREACH, MARKETING AND ENGAGEMENT:**

The 2015 ACRTC will be promoted to CNCS Area Managers, State Offices, the Senior Corps Associations, and commissions. By January 2015, a proposed agenda, trainer credentials, and registration information will be published. Marketing materials will be posted on ASC's and CCCS' web sites, social media (Facebook, Twitter), and e-news subscriptions. CCCS will request that the 2015 ACRTC 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 ARCTC is 250 participants: 110 AmeriCorps State and National program staff; 60 RSVP, Foster Grandparent, and Senior Companion program staff; 30 Commission staff; and 50 other invited key stakeholders such as Social Innovation Fund grantees, and Volunteer Generation Fund grantees.

### **CONFERENCE DESIGN METHODOLOGY:**

Connecticut and New Hampshire Commissions will co-facilitate an inclusive planning process to

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advise the development of the conference. A committee will be formed that represents the 14 states, a district and the territories in the region and includes delegates from AmeriCorps State/National, Senior Corps, CNCS State Offices, and commission staff. The committee will meet regularly upon CNCS' notice of intent to award a cooperative agreement to CCCS. The committee will determine the theme, agenda design, and learning modules of the 2015 ACRTC. It will be 2.5 days in length, with the half day of conference content on the 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 networking activity/service project. Opportunities for specific stakeholder groups to host independent meetings, orientations, and trainings may be offered pre or post conference upon request. The 2015 ACRTC, 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. The 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, the training conference 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, a survey of grantee staff in the region, 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. Wherever possible, the training conference 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, or 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. 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, EVALUTATION AND KNOWLEDGE GAIN:

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The Connecticut Commission 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 the Commission to conduct an on-line post training 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. The field may also benefit from 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:

When surveyed, the Atlantic Cluster identified late October as the best month to convene. However, November 1 through April 1 recently has proven to be a very stormy time of year along the east coast. In the last few years, several events scheduled during those months have had to be postponed or cancelled due to winter storms. Given that award announcements are expected to be issued close to September 30, 2014, October 2014 does not allow for enough lead time to efficiently implement a regional training. Therefore, we propose the Atlantic Cluster Regional Training Conference to be held in May 2015. The benchmarks for this timeframe are itemized as follows:

September 30, 2014: Announcement/negotiation/approval of cooperative agreement; October 31, 2014: Facility contract in place. ACRTC Committee members begin to meet regularly; December 31, 2014: All trainers identified and confirmed; marketing materials developed; February 1, 2015: Online registration opens and logistics coordination continues. General Registration is February 1 thru March 31. Late registration is April 1 to April 14. Registration closes on April 15. June 30, 2015: Learning materials submitted. Outputs and evaluation data returned (if aligned with CNCS requirement); August 2015: 90 days after conference, financials reconciled and reported to CNCS; November 2015: Mid-year survey conducted, collected and analyzed.

**HUMAN RESOURCE CAPACITY AND ROLES:** The Connecticut Commission on Community Service (CCCS) will serve as the point of contact with CNCS and submit all required materials. The Commission will manage the budget and allowable costs, secure conference facility, and print materials. The Commission will co-facilitate the planning committee with the New Hampshire Commission and ASC. The planning committee will guide conference development, secure trainers,

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and assist with promotion. The CCCS will respond to all requests for reasonable accommodations and ensure accessibility is fully realized. The conference registration system will contain prominent messaging for persons with disabilities to request reasonable accommodations. ASC will market the conference to the national service network and provide continuous support to the planning committee. All members of the Atlantic Cluster region will assist with keynote speakers, invited guests, presenters and facilitators and will promote the conference to their network of programs. The Executive Director of the Connecticut Commission will attempt to secure cash and/or in-kind contributions to increase revenue.

### RATIONALE FOR APPROACH:

The Atlantic Cluster represents Governor-appointed State Commissions and varied national service programs in states with great diversity in demographics, urban/suburban/rural, community needs and service focus. The goal of the planning committee is to meet these needs, while providing a level of uniformity in addressing core competencies as identified by the Corporation. The rationale for this approach is based on experience. The intent is to replicate the most successful elements of the October 2013 ACRTC and enhance the conference by reduced registration fees, more workshops for cross-stream programs, and increasing overall capacity.

### Organizational Capability

#### DEMONSTRATED SUCCESS AND EXPERIENCE:

The Connecticut Commission on Community Service has had several years of initiating, developing and implementing trainings at a statewide or regional level. In recent years (2010, 2011, 2012 and 2013), the trainings offered by the Commission to the national service programs in the state provided each participant with a continuing education unit (CEU) from the Connecticut Department of Education. A CEU is given to those who participate in a recognized continuing education program, with qualified instruction and sponsorship. National Service program staffs have used CEU records to build out their resume or provide evidence of completion of continuing education requirements mandated by some professional societies or governmental licensing boards. In addition, Connecticut's annual AmeriCorps launch has maintained a 1-day training conference model since 2002. All AmeriCorps programs (State, National, NCCC and sometimes VISTA) are invited to participate in the fall Launch. Template workshops at the Launch have included "Shifting the Paradigm: Inclusion in Action!", "Leading from the Heart: Navigating Conflict while Building Teams", and "Who Wants to be a Provisionaire?" Specific to Commission funded AmeriCorps programs, each September we hold a 2 ½-day AmeriCorps Boot Camp. All program staff is mandated to attend. Workshops cover all

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areas of AmeriCorps program management, including risk-based monitoring, recruitment and retention, criminal history background checks, performance measures, financial management and reporting. Lastly, the Connecticut Commission also has a track record of working with our neighboring states to host a training event. In collaboration with Campaign Consultations - Connecticut, Rhode Island and Massachusetts hosted successful cross-stream training in Hartford, Connecticut. AmeriCorps programs, Learn & Serve programs and Senior Corps programs from all three states participated.

These few examples demonstrate that the Connecticut Commission is accustomed to routinely providing education opportunities with large audiences and multiple tracks of learning. Also, the Commission has a breadth of experience in the design and facilitation of person-centered learning interventions for smaller cohorts of AmeriCorps with Senior Corps programs. The topics of these trainings have included financial management, grant compliance and performance, performance measurement, theory of change and methods of data collection that demonstrates impact.

### EXPERTISE OF KEY STAFF:

The Connecticut Commission intends to contract with ASC staff to supplement the efforts of the planning committee. Qualifications of the key staff from ASC and the Connecticut Commission assigned to the ACRTC are as follows:

Rachel Manuel Bruns, Deputy Director, Programming and Operations for ASC. 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), Wisconsin Volunteer Coordinator's Association (2013) and provided support to all five (5) regional training conferences in 2013.

Melissa Georges, has more than four years of experience as the Commission's Training and Special Events Coordinator. She has her Master of Science in Organizational Management and Human Resource Development. She will serve as the local lead project manager for the 2014 Atlantic Cluster Regional Training Conference.

Jacqueline Johnson, the Executive Director of the Connecticut Commission on Community Service will provide additional guidance and support. She has more than seventeen years of experience working with the national service programs in Connecticut and beyond. The Executive Director of the Connecticut Commission has served on the training advisory committees under the leadership of Gretchen Van der Veer, Director in the Office of Leadership Development and Training, in 2008,

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2009, 2010 and 2011. The ED also has experience on working with ASC (in the early years) to develop a training module for Executive Directors of State Commissions.

Nikki Singer, is the Commission's Communications Officer. With more than a dozen years of experience coordinating and communicating special training events, Ms. Singer will be principally responsible for the logistics of registration. With the assistance of all other cluster commissions, state offices and key investors in national service, we will plan a regional training conference that will ensure all participants are better able to engage more Americans in results-driven service, share improved impact data, and build an enriched knowledge of compliance competencies.

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

### SYSTEMS, STRUCTURES, AND STAFFING

The Connecticut Commission on Community Service staff contains a balanced and diverse team of national service subject matter experts. Collectively, the staff has 54 years of experience in national service, program administration and event management. All core staff is knowledgeable in grant requirements and developmental needs national service programming. The project team for the ACRTC will be supported and supervised by the Commission Executive Director and the State Office (where appropriate).

### FISCAL OVERSIGHT:

The Connecticut Commission on Community Service is housed within the State of Connecticut's Office of Higher Education. The CCCS has managed the following federal grants since 1993: AmeriCorps State Competitive and Formula, Commission Admin, PDAT, Disability, AmeriCorps VISTA, AmeriCorps American Recovery and Reinvestment Act grant, AmeriCorps Fixed Amount Grants, and the Learn and Serve CBO grant. The Office of Higher Education (formerly the Department of Higher Education) serves as the fiscal agent for the CCCS. The Office adheres to the Generally Accepted Accounting Principles, undergoes regular financial reviews and is audited annually by the Auditors of Public Accounts. As part of a state agency, the CCCS has sound fiscal, program and personnel policies that are reviewed and updated on a regular basis. Expenditure and revenues are tracked allocated appropriately in the state's financial management system. The Corporation for National and Community Service OIG's audits of the Commission in 2001 and 2010 sited no material findings in either audit. The Office of Higher Education will review and approve the cooperative agreement with the CNCS and the subsequent contracts with ASC, facility and trainers.

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The Office will also supervise the execution of each contract's scope of work and financial reconciliation.

### PROJECT MANAGERS:

The project management duties of event planning and training design will be designated among the core team that includes Melissa Georges (CCCS), Nikki Singer (CCCS), Rachel Manuel Bruns (ASC), and Jacqueline Johnson (CCCS).

### Cost Effectiveness and Budget Adequacy

The registration fee proposed is as follows: \$125 for General Registration and \$150 for Late Registration. The registration for the virtual conference intends to be no more than \$25. The proposed registration fees were built to factor in meeting room rental, seven meals, live-streamed workshops, trainers' fees and travel. The Connecticut Commission on Community Service estimates that nearly \$15,000 of in-kind resources (including staff support, supplies, subscriptions and miscellaneous costs) will be applied.

The budget proposed is sufficient to provide the participants with a quality experience and an effective and efficient learning experience. The \$50,000 requested will allow for enhancements to the Atlantic Cluster Regional Training Conference including live-streamed workshops, increased participation and increased capacity of the project management team. These enhanced outputs are expected to increase the overall learning outcomes for participants.

### Clarification Summary

N/A

## Required Documents

Document Name

Status