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Executive Summary

The Florida Commission on Community Service (Volunteer Florida) is pleased to offer this proposal as the lead applicant for the Southern Region of the Corporation for National and Community Service (CNCS), a consortium of members of State Service Commissions, to facilitate the planning, implementation, and financial oversight of the 2014-15 South Cluster National Service Conference (South Cluster NSC). Our tentative plans are to hold this conference in Central Florida (likely Orlando) in the late spring of 2015.

Volunteer Florida, in collaboration with the American Association of State Service Commissions (ASC), proposes a multi-day regional conference for AmeriCorps State/National, Senior Corps, and commission program staff and leadership. The South Cluster NSC will include tracks specific to the listed stakeholders, comprised of collaborative sessions to facilitate cross-stream training and dialogue. Trainings will focus on CNCS competencies in performance measures, evaluation, grant compliance, program and financial management, and other topics vital to effective program impact.

The amount of this funding request is \$50,000. Additional costs for the conference, projected to be \$21,000 for a conference with 200 total attendees, will be covered by registration fees.

Program Design

OUR APPROACH AND PROPOSED REGIONAL SCOPE: Volunteer Florida in Tallahassee, FL, will serve as the lead applicant for the 2014-15 South Cluster NSC. America's Service Commissions (ASC) in Washington, DC, the national association of the 53 state service commissions, will provide significant support in the planning, development, and implementation of our regional conference, and will assure our conference meets CNCS deliverables and is consistent with the other planned conferences.

Our consortium will also include Serve Alabama, Georgia Commission for Service & Volunteerism, Kentucky Commission on Community Volunteerism & Service, Volunteer Mississippi, North Carolina Commission on Volunteerism & Community Service, South Carolina Commission on National & Community Service, Volunteer Tennessee, Virginia Office of Volunteerism & Community Service, and Volunteer West Virginia. We held a regional conference call on July 7, and have been assured of region-wide commitment for support and participation. We also plan to seek significant participation from additional stakeholders representing AmeriCorps State/National and Senior Corps programs in the region, CNCS State Offices, and representation from the full CNCS program network (VGF, Social Innovation Fund, and AmeriCorps National Direct, Indian Tribes, VISTA, and NCCC.)

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PLAN & INFRASTRUCTURE: Our conference planning strategy will be to build upon the success of the 2013 National Service Conferences held in Colorado, Iowa, New Jersey, Tennessee, and Oregon. Under the leadership of ASC, we have already had planning calls with the leadership from these states, to assure that we gain from the strengths and lessons learned from the 2013 conferences. Volunteer Tennessee, the lead state for the 2013 South Cluster NSC, has been particularly helpful in assisting us as we begin our planning process.

Along with Volunteer Florida, state commissions in Utah, Texas, Michigan, and Connecticut are also designated as lead applicants in their regions. Each lead applicant will partner with ASC to assure consistent National Service Conferences nationwide. Volunteer Florida and ASC will provide logistical support for the 2014-15 South Cluster NSC. Volunteer Florida proposes to host the conference in the Orlando area, which was the unanimous decision of the consortium on our July 7 call. Orlando is one of the least expensive cities in the country in terms of average airline ticket costs, and offers a very wide variety of full-service conference hotels. We will schedule the conference in the late spring of 2015 (between March and May), working to assure the timing is distinct from the other regional conferences to assure that ASC and CNCS staff have the greatest opportunity to offer support and expertise.

OUTREACH, MARKETING, ENGAGEMENT: Volunteer Florida and ASC will promote the 2014-2015 South Cluster NSC through CNCS area managers, state officers, Senior Corps Associations, and commissions. We will develop and provide a proposed agenda, trainer credentials, and registration information. These materials will be posted on the ASC, Volunteer Florida and CNCS websites, social media outlets (Facebook, Twitter, LinkedIn), and through e-news subscriptions. Marketing and outreach materials will contain a statement that the material may be requested in alternative formats. Regional branding will be created in addition to CNCS branding required by the cooperative agreement. Each consortium member will forward marketing materials to their key stakeholders. The target enrollment for the South Cluster NSC is 200 participants: 60 AmeriCorps State/National and VISTA directors, 20 state commission staff and commissioners, 30 Foster Grandparent program staff, 30 Senior Companion program staff, 40 RSVP program staff, and 20 other service stakeholders. Based on feedback from the 2013 regional conferences, we may significantly exceed these numbers, but these will serve as our conservative planning estimates. The design of our budget will assure that all additional costs will be covered with the additional registration fee revenue if we exceed these number.

CONFERENCE DESIGN: The 2014-2015 South Cluster NSC will offer tracks for AmeriCorps,

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Senior Corps, and state commissions. We are also considering adding tracks or sessions specifically for commissioners, new state commission employees, and perhaps for AmeriCorps members (targeted at Florida members, but open to other states). Sessions in these tracks fulfilling the required components for CNCS competencies will be featured prominently on the agenda: performance measures, data collection, application of evidence-based theories of change, evaluation, grants management, and financial management. In addition to these topics, the 2014-2015 South Cluster NSC will serve the most common and critical needs of National Service programs in the Southern Region. Volunteer Florida and ASC will identify these needs through commission and CNCS State Office annual needs assessment, summary of most recent trainings, and feedback from Program Officers. Analysis of this feedback will allow us to ensure regionally aligned learning priorities and to appropriately structure the emphasis and flow of the overall content for maximum educational impact. The planning committee, peer presenters, and Technical Assistance providers will develop conference curricula. After the conference, learning materials (slides, handouts, etc.) will be posted on the National Service Knowledge Network for cataloging/reference to the field.

At this time, the intent of each of the commission lead applicants is to consider offering workshops for online streaming at their respective conferences, which would allow participants unable to travel to receive all of the available content in manageable increments for effective online learning. Because of low participation for this type of delivery in 2013, however, ASC and lead states will be looking carefully at a cost benefit analysis to determine if offering virtual sessions for 2014-15 is justified.

Michigan has a well-developed National Service Program Director core competency tool, which is utilized for risk assessment, monitoring, and needs analysis. The competencies in the tool include program management, theory of change/continuous improvement, site management, community engagement and strengthening, member support, financial management, sustainability, professional development, and leadership and public policy. The tool also itemizes the professional abilities that National Service programs managers must possess in order to be successful and provides continuum of performance indicators for staff who are struggling, emerging, strong, or exemplary. Volunteer Florida considers this tool useful for identifying learning interventions and plans to use in developing conference content.

Volunteer Florida and ASC will facilitate an inclusive planning process to prepare the curriculum and logistical details of the 2014-15 South Cluster NSC. A committee representing the Southern Region commissions, AmeriCorps State/National, Senior Corps, CNCS State Office, and ASC

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staff will meet regularly upon CNCS' notice of intent to award funds to Volunteer Florida. In addition to the required CNCS content, the consortium's initial ideas for common session topics include: AmeriCorps NCCC regional activities, increasing collective impact, service as a strategy to support disconnected youth, innovative cross-stream collaboration, disaster services and response, and area-specific topics (education, environment, etc.). Recognizing that many of our region's best resources are active members of the National Service family, Volunteer Florida and ASC will utilize peer trainers and presenters when possible (from commission and CNCS State office staff as well as National Service program directors). National training and technical assistance providers will likely be sought for their subject matter expertise, particularly for required topics like CNCS performance measures and grant and financial management. The South Cluster NSC will be 2-3 days in length, with the potential for half days on either end to allow for travel flexibility. Pre- and post-conference activities could include local service projects and affinity group meetings, orientations, or trainings.

OUTPUTS, EVALUATION, KNOWLEDGE GAINS: Volunteer Florida will work with CNCS on the required assessments of competency gains for performance measures and compliance. The assessment will be administered pre- and post-conference as instructed by CNCS. Additionally, Volunteer Florida routinely conducts post-conference evaluations to measure participant satisfaction, effectiveness of training, 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. Cases of success would be identified and analyzed in order to improve future training events.

Performance Measures and Expected Outcomes and how they will be measured: In keeping with the CNCS intention for these regional conferences, Volunteer Florida will design the South Cluster NSC with the goals of expanding regional capacity and strengthening leadership. We will work with CNCS and ASC to ensure that delivery of critical programmatic and fiscal training is done in a consistent manner across the country. We will use the CNCS defined assessment questions to address the required competencies listed below, as well as their prescribed methodology for collecting data on knowledge gains. Performance Measures and Expected Outcomes will be:

* Performance Measure # 1: AmeriCorps programs and Senior Corps projects will demonstrate evidence of impact and report on their respective CNCS National Performance Measure Outputs and Outcomes through the CNCS eGrants Performance Module. * Training Outcome # 1: Conference participants will demonstrate knowledge of CNCS performance measurement and evaluation

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competencies, such as: use of theory of change or logic models, understanding of performance measurement and evaluation, application of evidence-based approaches, application of data collection method, as well as how to access resources for continued learning.

* Performance Measure # 2: Compliance: AmeriCorps programs and Senior Corps projects will successfully meet CNCS program and federal grants management requirements. * Training Outcome # 2: Conference participants will demonstrate knowledge of CNCS compliance competencies, such as: grants administration, criminal history checks, program and financial management, as well as how to access resources for continued learning.

TIMELINE: Through discussions with ASC and the leadership of the Southern Region, the following timeline is projected to be able to maximize attendance within the region:

- * September 2014: CNCS notification of intent to award cooperative agreement
- * October - December 2014: Planning Committee convenes regularly, hotel contract executed, trainers secured, marketing materials developed, save-the-date released
- * January 2015: Registration system opens; Planning Committee meetings continue
- * Three weeks before the conference: Deadline for registration
- * Late March to Early May 2015: 2014-15 South Cluster National Service Conference (exact dates will be determined with ASC to coordinate with the timing of the other regional conferences)
- * Two weeks after the event: Materials supplied to National Service Knowledge Network
- * 30 days after the event: Outputs, evaluation, and knowledge gains data returned to CNCS
- * 90 days after the event: Financials reconciled/reported to CNCS
- * Six months after the event: Follow up evaluation sent, collected, and analyzed

CAPACITY AND STAFF ROLES: Volunteer Florida's Chief Operating Officer will serve as the point of contact with CNCS and submit required reports, evaluations, and learning materials. Volunteer Florida will manage the conference budget, collect registration fees, print conference materials and respond to reasonable accommodation requests. The ASC Deputy Director of Programming & Operations will create and manage an online registration system, work with Volunteer Florida to secure meeting space and lodging, support Volunteer Florida in the development and submission of all required reports and evaluations to CNCS, assist with the creation of conference materials, and co-manage the Planning Committee. The Executive Directors of Volunteer Florida and ASC will identify and secure sponsors for the conference, and will assist with promotion of the

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conference. The Planning Committee will assist with the procurement of keynote speakers and promote the conference to their network of programs.

RATIONALE FOR APPROACH: The overall approach for this conference is to provide training and Technical Assistance to improve the programmatic quality and accountability of National Service programs and projects in the Southern Region. The conference will include the CNCS required elements and supplementary elements determined by the Planning Committee. Based on prior conference and training experience, we are confident that the conference will lead to the desired CNCS outcomes and allow us to meet the outcomes defined by the region. It is our intent to replicate the most successful elements of the 2013 Conferences, and enhance the event with new ideas from the Planning Committee in coordination with all regional partners.

Organizational Capability

DEMONSTRATED SUCCESS: The Florida Commission on Community Service (Volunteer Florida) was legislatively established in 1994 and is administratively housed in the Governor's office, allowing Volunteer Florida to serve as the state's ambassador for service and volunteerism. From its beginning as a state commission, Volunteer Florida has been responsible for designing and implementing large-scale conferences, trainings and meetings. Examples of these events in recent years include: AmeriCorps Member Statewide Conferences (including Viva AmeriCorps Statewide Conference, Member Launches, AmeriCorps Week Finale Host & Service Project, Florida AmeriCorps & National Service Conference, and AmeriCorps Statewide Conference -- 2012, 2009, 2008, 2006, 2005); AmeriCorps Program Director Meetings (since 1994); Disability Inclusion Trainings (since 1994); AmeriCorps Regional Trainings (including 9/11 Disaster Training/Day of Remembrance, Civic Sense, and AmeriCorps Alumni Leadership Council -- 2009-2011); AmeriCorps Member Training (including Life After AmeriCorps, Diversity, Conflict Resolution, Civic Sense, and Teambuilding Training -- ongoing); and Statewide Service Projects (including MLK, Beach Walk, AmeriCorps Week/I Can, and 20th Anniversary Celebrations - 2009-2014).

Since its founding in 1997, ASC has routinely convened national and regional conferences for state service commissions and National Service programs. These conferences include: Regional NSCs (2013); State Service Commission Leadership Summits (2011, 2012, 2013); North Central NSC (w/Iowa Commission on Volunteer Service, 2012); VGFund Grantee Meetings (2010, 2011, 2012); and Commissioner Institute (2008).

EXPERTISE OF KEY STAFF: The Volunteer Florida and ASC staff members that will work on

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this project have extensive experience in program oversight, National Service program requirements, and grants management. The key staff listed below will lead the regional planning team, create media and marketing, coordinate conference logistics including facility/meals/lodging, communicate and contract with selected trainers, and evaluate knowledge gains. PROJECT MANAGERS: Rachel Bruns (ASC) and Art Johnstone (Volunteer Florida) will perform project management duties of event planning and training design.

* Rachel Manuel Bruns, ASC's Deputy Director of Programming and Operations, is an avid advocate for National Service and volunteering at the state and national levels. She is a shared staff member between ASC and the Iowa Commission on Volunteer Service. Other leadership roles she has held include Director of Volunteer Wisconsin, and Director of the Iowa Campus Compact where she worked in partnership with college and university presidents to educate students for civic and social responsibility. She has managed AmeriCorps State, AmeriCorps VISTA, and Learn and Serve programs, in addition to facilitating professional development for college/university faculty and staff on topics of community engagement and service-learning. She also played a lead role coordinating the 2012 and 2013 National Service Conferences.

* Art Johnstone, Chief Operating Officer for Volunteer Florida, has more than 24 years of experience working with nonprofits and government agencies. Art is also an accomplished trainer and instructional developer, and has worked in these capacities with Louisiana State University, University of Tennessee, University of California at Davis, and the International Food Protection Training Institute in Battle Creek, Michigan.

* Catherine (Cat) Keen, Director of National Service Programs and formerly with The Able Trust, brings 14 years of experience in nonprofit service delivery and management to Volunteer Florida. Cat and her National Services Team will assist in the development and implementation of all training, monitoring, and evaluation for the conference.

* Erin VanSickle, External Affairs Director for Volunteer Florida, will be responsible for significantly increasing the awareness of the 2014-15 South Cluster NSC. She will work closely with the other state commissions, state offices and ASC to assure that marketing to partners in each of the other Southern Region states is robust and effective.

SYSTEMS, STRUCTURE, AND STAFFING: As previously mentioned, Volunteer Florida has many years of experience planning events. Volunteer Florida has strong systems for procurement, invoice payment, event management and participant evaluation. The Volunteer Florida staff contains a balanced and diverse team of National Service subject matter experts. In addition to the staff

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members previously listed, each staff member below has sufficient experience to serve as a trainer and facilitator in their areas of expertise:

* Chester Spellman, Chief Executive Officer for Volunteer Florida, will provide guiding leadership, oversight, and vision for this project. He was appointed as CEO on April 27, 2012 by Governor Rick Scott. At Volunteer Florida, Spellman oversees more than \$20 million in federal, state and local funds supporting AmeriCorps and volunteer programs to meet critical needs in Florida's communities, and also leads the statewide coordination for volunteers and donations in disasters for the Florida Division of Emergency Management. Spellman's career in public service began in Jacksonville with Project SOS, culminating in his leadership role as Chief Operating Officer of the organization. He has more than a decade of experience working in the nonprofit sector.

* Ericka McKibbin, AmeriCorps Program Manager for Volunteer Florida, has over 19 years of experience in the National Service arena. Her background ranges from serving as a member of the AmeriCorps National Civilian Community Corps to a Peace Corps Volunteer in El Salvador to managing a statewide service learning VISTA initiative.

* Jamie Cliburn is a public service professional with Volunteer Florida. Prior to joining Volunteer Florida as a Program Manager in September, 2013, Jamie served for 2 years with the Peace Corps in Suriname, South America and 3 years with the Florida Department of Management Services.

* Anitra Thomas, Grants and Training Coordinator for Volunteer Florida, has been with the Commission for 7 years. Anitra handles the coordination of the AmeriCorps grant review processes, AmeriCorps Program Director and Member trainings as well as assistance with the management and training for the Florida Donations Portal during times of disaster for the ESF 15 function of the Division of Emergency Management.

* Paula DeBoles-Johnson, MPA, CCM has been a part of the Volunteer Florida team for eight years as a Program Manager. She has had more than 25 years of progressive leadership experience with the Departments of Children & Family, Health, Transportation, and local nonprofit organizations.

Cost Effectiveness and Budget Adequacy

REASONABLE COST FACTORS: Our expenses for hotel facility charges, transportation and other costs are estimated at \$95/person for a 200 attendee conference. Other costs include live-streaming technology for virtual participants (if warranted by demand), trainer fees, and travel for trainers and ASC conference personnel. The project managers will dedicate a major percentage of their time for approximately six months to planning and implementing the South Cluster NSC, and grant funds will cover part of these personnel expenses. To supplement the CNCS funds and cover all costs, the

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registration fees proposed are \$150 for attendees within 250 miles of Orlando, and \$100 for attendees beyond 250 miles. The rationale for the reduced rate for persons travelling a greater distance is to offer a built-in "scholarship" to offset increase travel costs. These registration fees are the same charged for last year's South Cluster NSC in Nashville. With an enhanced experience offered almost at cost for participants, we expect a minimum of 200 participants. If our conference exceeds this minimum registration number, which seems likely based on feedback received from ASC and the leaders of the 2013 conferences, registration fees will fully cover any additional costs incurred. Registration for virtual attendees has yet to be determined, but it will be based on the overall cost of the selected service and is not expected to exceed \$35 per person. The Planning Committee and Executive Directors of Volunteer Florida and ASC will seek additional revenue through sponsorships as needed.

SUFFICIENCY OF BUDGET: Based on cost estimates from recent events in Florida, the budget proposed is sufficient to provide the participants with an excellent conference and an effective learning experience. The \$50,000 in CNCS funds, combined with projected registration fees of \$21,000, will cover the projected costs for meals, facilities, trainers, and workshops, and the professional services of two project managers who will devote a significant percentage of time to assuring an excellent conference over an approximate six month period.

SUFFICIENCY OF FINANCIAL OVERSIGHT: Our financial management team is led by Janis Timmons, Finance Director, who is responsible for fiscal accountability and management of all grants. Janis has 21 years of successful experience and knowledge of grant administration and compliance in governmental and nonprofit environments. She is an accomplished trainer in accounting systems and compliance issues. Our finance team utilizes Sage Management Information Processes (MIP) accounting software to ensure all funds are accounted in compliance with federal regulations and General Accepted Accounting Principles (GAAP). MIP software is the preferred nonprofit financial management solution used to manage budgets and maximize grant resources.

Our current organizational budget and the percentage of the budget this grant would represent: Volunteer Florida's annual program budget currently exceeds \$10.9 million. This grant request of \$50,000 would represent less than ½ % of the total organizational budget.

Our plans to ensure compliance with federal requirements: The financial management systems we already have in place will be utilized for our proposed grant funding for the 2014-15 South Cluster NSC, and will ensure the highest level of accountability and adherence to federal and state policies. Our proven program management system continues to meet the Corporation for National and Community Service (CNCS) standards and OMB guidelines, rules and regulations.

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Clarification Summary

To be added during clarification period.